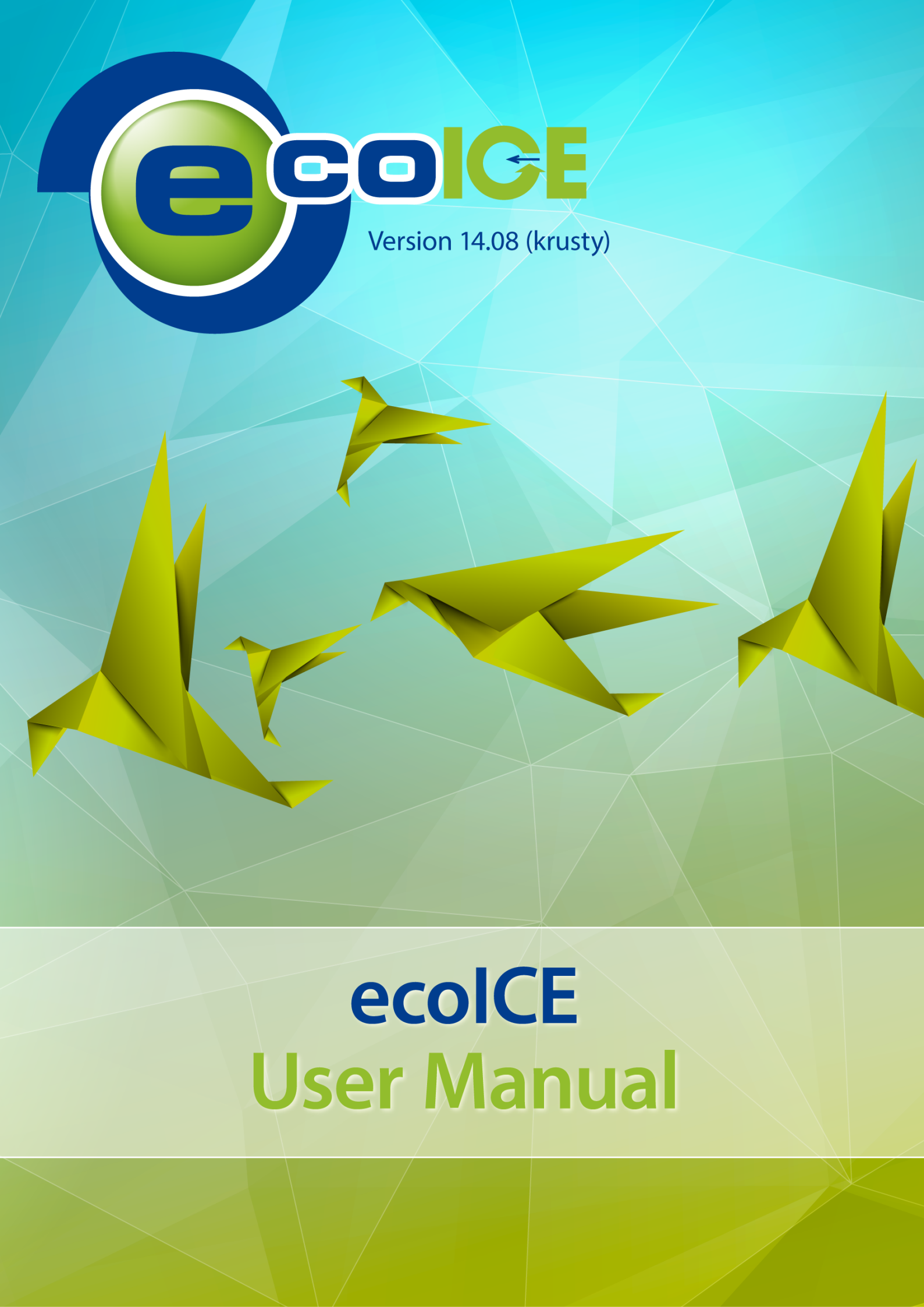

ecoICE
User Manual

Imprint

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Copyright	© 2015 by	ecoDMS GmbH Salierallee 18a 52066 Aachen Germany
E-Mail Sales		info@ecodms.de
Website		www.ecodms.de
Phone Sales		+49 (0) 241 47 57 2 01
Text and Design		ecoDMS GmbH
Seat of the Company		Aachen
Court of registration		Aachen County Court Register of Companies 19201
Management		Michael Schmitz (Dipl. -Betrw. [degree in business administration]) Helge Lühmann

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1 Getting Started

ecoICE is a **pre-stage** to ecoDMS. In ecoICE you can request scanned PDF and TIFF files and, if required, edit, classify and archive them. After the documents have been archived they are stored in the ecoDMS database and can be requested via the document management system by the respective user. Here you can read about the first steps with ecoICE in order to make the initial work with the programme easier.

1. Configure your scanner. We recommend you use the Scaninput Folder on the ecoDMS server. Alternatively, you can also scan your documents via the TWAIN/WIA/SANE interface. The device must have PDF and/or TIFF as scan formats. It is best to scan in the documents in black and white (black-white= 1-bit colour depth) or in shades of grey with 200-300 DPI.

Fig. (similar) 1.1: Configure Scanner

2. In order to scan a whole document batch, we recommend you use ecoDMS separator pages. Place such a separator page behind each document before you scan it. ecoDMS then automatically separates the documents into individual files. You can download free separator pages in the download area at ecodms.de.

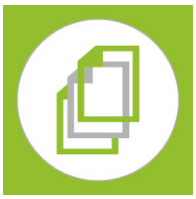

Fig. (similar) 1.2: Use Separator Pages

3. Request the documents in ecoICE. Optionally, there are several editing functions available now. Make your changes -if required- and save the changes.

Fig. (similar) 1.3: Edit Documents

4. Via the classification you can assign the virtual folder in ecoDMS, the document type, the status, the permissions and many other information (meta data) for each document. With this information, and in addition to the full text search, the documents can be retrieved and then saved together with further details. The classification can be done either manually by the user or automatically by classification templates.

Fig. (similar) 1.4: Classification

5. Now you can archive the file. All archived text documents automatically undergo a background full-text indexing and are available in ecoDMS in the original scan format and also in the long-term archiving format PDF/A.

Fig. (similar) 1.5: Archiving

2 Basic Elements in The User Interface

Overview of the basic elements in the user interface.

2.1 View

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**

In this window you can view the selected page of a document.

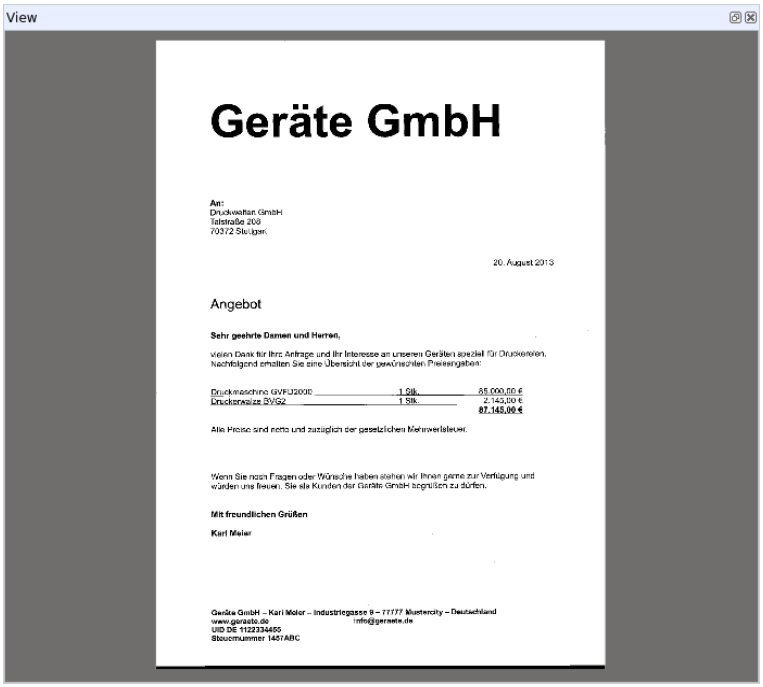
View
Geräte GmbH
An:
Druckwalzen GmbH
Talstraße 208
70372 Stuttgart
20. August 2013
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Fig. (similar) 2.1: Window - View

2.2 Archive

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**

The archive selection is located in the toolbar. Here you can select the archive you need. The default selection is "Default Archive".

Fig. (similar) 2.2: Archive

2.3 File Information

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**

This area displays information on the selected document.

1. Pages
2. Size
3. Resolution
4. Bit Depth
5. Color Mode
6. Page Name

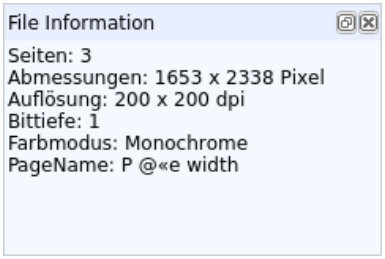

Fig. (similar) 2.3: Window - File Informationen

2.4 Icons in ecoICE

The ecoICE client contains various icons on the toolbar. Click the respective icon to execute the function.

	Save Changes		Save Document As...
	Save Document as PDF...		Scan New Document
	Add Page(s) to Document		Copy Text from Document
	Reload Desktop		Zoom Out
	Zoom In		Fit (Zoom)
	Rotate Left		Rotate Right
	Rotate 180 Degrees		Delete Selected Page(s)
	Add Page(s) to Document		Export Selected Page(s)
	Previous Document		Next Document

	Request Scanned Documents		Delete Document from Server
	Split Document		Unlock Document
	Search Matching Classification Template		

2.5 Classification Dialogue Box

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**

Here the scanned documents can be classified and archived in ecoDMS.

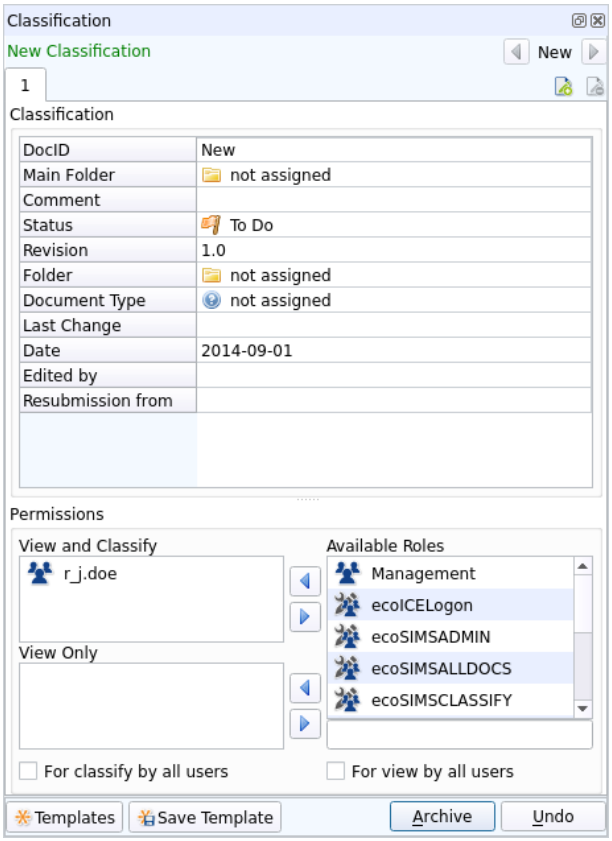

Fig. (similar) 2.4: Window - Classification

2.6 Menu Bar

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**

In the menu bar you can find commands as dropdown menus. You can open the menus either with a mouse-click or with the shortcut Alt + underlined letter.

2.7 Title Bar

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**

The title bar is the upper edge of the ecoICE client. It displays the name of the registered user and the running application.

2.8 Thumbnails

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**

Thumbnails are previews which provide an overview of all pages contained in a document.

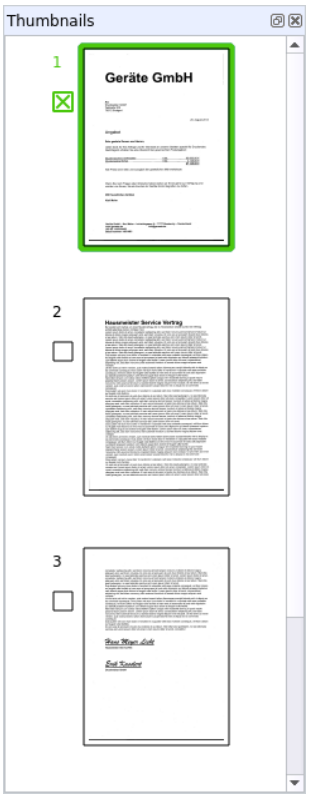

Fig. (similar) 2.5: Window - Thumbnails

3 Desktop Settings

You can configure the ecoDMS interface flexibly for each workplace.

3.1 Reload Desktop

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**

You can reload the desktop of the ecoDMS client. For example, this can be necessary if you made settings / changes within the folder structure, document types, etc.

1. Click the "Reload Desktop" icon in the toolbar. **or**
2. In the menu click "View - Reload Desktop".

The deskop is reloaded. This process my take some time.

Fig. (similar) 3.1: Icon - Reload Desktop

3.2 Reset Desktop

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **Please note that these settings refer to the individual workstation and are not stored in the user profile.**
- **We recommend a screen resolution of at least 1280 x 1024 px.**

You can reset the desktop to the default view if necessary.

1. In the menu click "View - Reset Desktop".
2. Confirm then the message in the dialogue box with "OK".
   a) The desktop will now be reseted into the intial state.

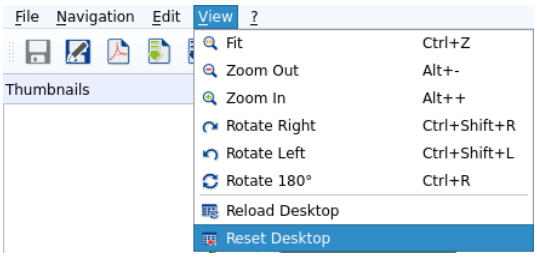

Fig. (similar) 3.2: View - Rest Desktop

3.3 Arrange Windows in Tabs

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **Please note that these settings refer to the individual workstation and are not stored in the user profile.**
- **We recommend a screen resolution of at least 1280 x 1024 px.**

Overlay the windows (in tabs) like this:

1. Use the mouse to grab the window by the title bar
2. Drag the window onto the other window.
3. Release the mouse button

Fig. (similar) 3.3: Arrange Windows in Tabs

3.4 Arrange Windows in Tabs

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **Please note that these settings refer to the individual workstation and are not stored in the user profile.**
- **We recommend a screen resolution of at least 1280 x 1024 px.**

You can place and move the windows in ecoDMS according to your own wishes. To arrange the windows in tabs / above the other, complete the following steps:

1. Use the mouse to grab the window by the title bar.
2. Drag the window onto the other window.
3. Release the mouse button.

3.5 Tile Windows Vertically

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **Please note that these settings refer to the individual workstation and are not stored in the user profile.**
- **We recommend a screen resolution of at least 1280 x 1024 px.**

You can place and move the windows in ecoDMS according to your own wishes. To arrange the windows vertically, complete the following steps:

1. Use the mouse to grab the window by the title bar.
2. Drag the window above the edge of the other window.
3. Release the mouse button.

3.6 Tile Windows Horizontally

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **Please note that these settings refer to the individual workstation and are not stored in the user profile.**
- **We recommend a screen resolution of at least 1280 x 1024 px.**

You can place and move the windows in ecoDMS according to your own wishes. To arrange the windows horizontally, complete the following steps:

1. Use the mouse to grab the window by the title bar.
2. Drag the window to the right position with the mouse.
3. Release the mouse button.

3.7 Undock Windows

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **Please note that these settings refer to the individual workstation and are not stored in the user profile.**
- **We recommend a screen resolution of at least 1280 x 1024 px.**

You can place and move the windows in ecoDMS according to your own wishes. To undock windows, complete the following steps:

1. Click the "Undock Button" in the title bar of the corresponding window.
2. Now move the window to any position.
3. Double-click the title bar of the window to move it back to the original position.

3.8 Hide Windows

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **Please note that these settings refer to the individual workstation and are not stored in the user profile.**
- **We recommend a screen resolution of at least 1280 x 1024 px.**

You can hide not required windows in the client. Complete the following steps:

1. Right mouse-click in the toolbar or menu bar.
2. Remove the marker (cross) to hide a window.

Alternatively you can close the windows by clicking the "Close Icon" in the title bar of the window.

3.9 Show Windows

Non-visible window can be displayed in the client when needed. Complete the following steps:

1. Right mouse-click in the toolbar or menu bar.
2. Set the marker (cross) to show a window .

3.10 Minimise / Maximise / Restore Client

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **Please note that these settings refer to the individual workstation and are not stored in the user profile.**
- **We recommend a screen resolution of at least 1280 x 1024 px.**

You can minimise, maximise and restore the client by using the default icons of your operating system. Normally you can find the icons in the title bar of the application.

4 Login & Programme Start

The ecoDMS Server is a client server system and as such forms the basis of the entire system. Here you securely store all data and information in a "postgreSQL database". The "Connection Manager" connects to the ecoDMS Server. To work with the application, you must register in the "Connection Manager".

4.1 Open Application

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **In order to work with the ecoICE client, the user needs the roles - permissions ecoICELogon and ecoSIMSCLASSIFY.**

If the "Connection Manager" and the ecoDMS server are connected, you can open the client. There are several options:

1. Double-click the icon on your desktop or on your toolbar. **or**
2. Select the programme file in the programme manager of your operating system.

Then the programme starts. The start screen displays.

Fig. (similar) 4.1: Deskop Icon

4.2 Exit Application

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **The connection to the ecoDMS server is only terminated if all clients are closed and the connections have been disconnected in the Connection Manager at the respective workstation.**
- **Merely disconnecting the connection manager or closing the client will not unblock a licence! To do this, close or disconnect all ecoDMS components and the connection manager at the workstation.**

You have the choice between the following options if you want to exit the application:

1. Click the "Exit" icon of the title bar. **or**
2. Select "File - Exit" from the menu. **or**
3. Use this keyboard shortcut: Ctrl+ F4

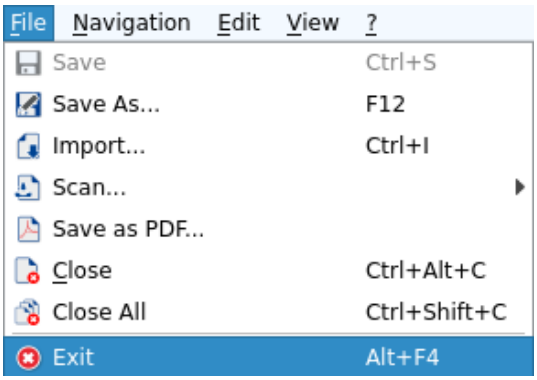

Fig. (similar) 4.2: File - Exit

5 Scan Process

As default one “Scaninput Folder” is defined in the system for the server-side scanning process. Optionally the administrator can add subfolders. Furthermore, this application includes a TWAIN / WIA / SANE interface. This allows direct scanning in the program. In this chapter you can learn more about the scanning process.

5.1 Technical Information

1. Basically you can use any network scanner and any USB scanner which have the "Scan-to-Folder" function to scan into the scan-input folder of ecoDMS.
2. In addition, you can use numerous scanners, which have a TWAIN/WIA interface, to directly scan into the ecoICE scan-programme.
3. The device must have PDF and/or TIFF as scan formats.
4. It is best to scan in the documents in black and white (black-white= 1-bit colour depth) or in shades of grey with 200-300 DPI.

5.2 Scaninput Ordner

Below you can read details to scan via the “Scaninput Folder”.

5.2.1 Destination Path

- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **After the archiving process, the scanned PDF or TIFF files are automatically converted into the (readable) PDF/A format. The quality and size of the file determine the conversion time and the feasibility. After the successful conversion, the PDF/A can be opened. Until then the original file remains. You can open the PDF/A via the table. You can retrieve the original files via the version management function.**
- **The Scaninput folder is recommended as the scanning method because only with this method all processes on the server (including template recognition) can be carried out.**
- **In order to access this folder, the access rights must be adjusted accordingly.**

The "Scaninput Folder" is stored at the specified data path that was chosen during the installation of the ecoDMS server:

1. In Ubuntu/Debian it is always at: /opt/ecosims/workdir/scaninput
2. Standard Windows: %ProgramData%\ecodms\workdir\scaninput
   a) Example for the destination path of a local server installation under Windows: [C:\Programme\ecoDMS GmbH\ecoDMS Server\workdir\scaninput]

If custom "Scaninput subfolder" have been created, they are located as a subfolder in the corresponding data path.

5.2.2 Scanning

- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **After the archiving process, the scanned PDF or TIFF files are automatically converted into the (readable) PDF/A format. The quality and size of the file determine the conversion time and the feasibility. After the successful conversion, the PDF/A can be opened. Until then the original file remains. You can open the PDF/A via the table. You can retrieve the original files via the version management function.**
- **The Scaninput folder is recommended as the scanning method because only with this method all processes on the server (including template recognition) can be carried out.**
- **In order to access this folder, the access rights must be adjusted accordingly.**

1. Configure the “Scaninput Folder” as your destination path on your scanner.
2. Scan you documents to the ““Scaninput Folder”.
3. The client receives the documents after just a few seconds from the “Scaninput Folder”.
   a) This is the reason why the documents are displayed in the folder just for a few seconds.
   b) Depending on the file size, it can take a few minutes to request the documents via the client.

5.2.3 Manual Access

- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **After the archiving process, the scanned PDF or TIFF files are automatically converted into the (readable) PDF/A format. The quality and size of the file determine the conversion time and the feasibility. After the successful conversion, the PDF/A can be opened. Until then the original file remains. You can open the PDF/A via the table. You can retrieve the original files via the version management function.**
- **The Scaninput folder is recommended as the scanning method because only with this method all processes on the server (including template recognition) can be carried out.**
- **In order to access this folder, the access rights must be adjusted accordingly.**

Completed TIFFs or PDFs can also be stored manually in the folder.

1. Access from your workstation to the desired "Scaninput Folder". To do this, use the address of the destination path.
2. Insert the PDF and / or TIFF files in the "Scaninput Folder".
3. The client receives the documents after just a few seconds from the “Scaninput Folder”.
   a) This is the reason why the documents are displayed in the folder just for a few seconds.
   b) Depending on the file size, it can take a few minutes to request the documents via the client.

5.3 TWAIN/WIA/SANE Interface

Alternativly to the “Scaninput Folder” scanning is possible directly from the client. In this case, the scan is processed via a TWAIN / WIA / SANE interface. Below you can read details for this process.

5.3.1 Select Scanner

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **After the archiving process, the scanned PDF or TIFF files are automatically converted into the (readable) PDF/A format. The quality and size of the file determine the conversion time and the feasibility. After the successful conversion, the PDF/A can be opened. Until then the original file remains. You can open the PDF/A via the table. You can retrieve the original files via the version management function.**
- **The Scaninput folder is recommended as the scanning method because only with this method all processes on the server (including template recognition) can be carried out.**
- **The TWAIN/WIA/SANE interface is compatible with many but not all scanner models.**
- **If you scan via TWAIN/WIA/SANE interface, the pre-classification is only possible via the function -Search Matching Classification Template-.**
- **Via the TWAIN/WIA/SANE interface only TIFF files can be scanned.**

To use the interface you have to select a scanner. Complete the following steps:

1. Click menu “File - Scan - Select Scanner”
2. The “Select Scanner” dialogue box opens.
   a) Choose from the list of available scanners the required device.
   b) Confirm this process with “OK” or cancel it with “Cancel”.

5.3.2 Configure Scanner

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **After the archiving process, the scanned PDF or TIFF files are automatically converted into the (readable) PDF/A format. The quality and size of the file determine the conversion time and the feasibility. After the successful conversion, the PDF/A can be opened. Until then the original file remains. You can open the PDF/A via the table. You can retrieve the original files via the version management function.**
- **The Scaninput folder is recommended as the scanning method because only with this method all processes on the server (including template recognition) can be carried out.**
- **The TWAIN/WIA/SANE interface is compatible with many but not all scanner models.**
- **If you scan via TWAIN/WIA/SANE interface, the pre-classification is only possible via the function -Search Matching Classification Template-.**
- **Via the TWAIN/WIA/SANE interface only TIFF files can be scanned.**

After you have chosen a scanner, you have to configure it. Complete the following steps:

1. Click menu “File - Scan - Settings”
2. The “Scanner Optiones” dialogue box opens.
   a) Select the matching scanner log according to the operating system and the scanner.
      i. TWAIN

ii. WIA
iii. SANE
iv. ...

b) Configure the scan options for the scanning process:
   i. Rotate Pages Automatically
   ii. Suppress Empty Pages
   iii. Detect Separator Pages

c) Confirm this process with "OK" or cancel it with "Cancel".

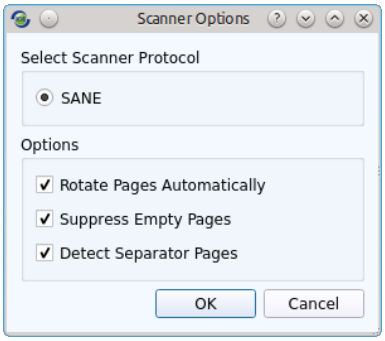

Fig. (similar) 5.1: Scanner Options

5.3.3 Scanning

If the scanner is selected and set up, there are various ways to perform scanning.

5.3.3.1 Scan New Document

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **After the archiving process, the scanned PDF or TIFF files are automatically converted into the (readable) PDF/A format. The quality and size of the file determine the conversion time and the feasibility. After the successful conversion, the PDF/A can be opened. Until then the original file remains. You can open the PDF/A via the table. You can retrieve the original files via the version management function.**
- **The Scaninput folder is recommended as the scanning method because only with this method all processes on the server (including template recognition) can be carried out.**
- **The TWAIN/WIA/SANE interface is compatible with many but not all scanner models.**
- **If you scan via TWAIN/WIA/SANE interface, the pre-classification is only possible via the function -Search Matching Classification Template-.**
- **Via the TWAIN/WIA/SANE interface only TIFF files can be scanned.**

To scan a completely new document, complete the following steps:

1. Select the function "Scan New Document" with one of the following options:
   a) Click menu "File - Scan - Scan New Document" **or**
   b) Click the toolbar icon "Scan New Document" **or**
   c) Enter this shortcut: F10

2. If several scanners are connected, you must select a source in the next step.
   a) If only one scanner is connected, the respective scanner window opens. The window is different for different scanners.
3. Start scanning process.
4. The scanned pages are loaded as a new document in the last position in the client.

Fig. (similar) 5.2: Icon - Scan New Document

5.3.3.2 Add Pages to Document

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **After the archiving process, the scanned PDF or TIFF files are automatically converted into the (readable) PDF/A format. The quality and size of the file determine the conversion time and the feasibility. After the successful conversion, the PDF/A can be opened. Until then the original file remains. You can open the PDF/A via the table. You can retrieve the original files via the version management function.**
- **The Scaninput folder is recommended as the scanning method because only with this method all processes on the server (including template recognition) can be carried out.**
- **The TWAIN/WIA/SANE interface is compatible with many but not all scanner models.**
- **If you scan via TWAIN/WIA/SANE interface, the pre-classification is only possible via the function -Search Matching Classification Template-.**
- **Via the TWAIN/WIA/SANE interface only TIFF files can be scanned.**

To scan a completely new document, complete the following steps:

1. Call up the document in the client.
2. Select the function "Add Pages to Document" with one of the following options:
   a) Click menu "File - Scan - Scan New Document" **or**
   b) Click the toolbar icon "Scan New Document" **or**
   c) Enter this shortcut: F10
3. If several scanners are connected, you must select a source in the next step.
   a) If only one scanner is connected, the respective scanner window opens. The window is different for different scanners.
4. Start scanning process.
5. The scanned pages will be added to the existing document.

Fig. (similar) 5.3: Icon - Add Page(s) to Document

5.4 Separator Pages

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **After the archiving process, the scanned PDF or TIFF files are automatically converted into the (readable) PDF/A format. The quality and size of the file determine the conversion time and the feasibility. After the successful conversion, the PDF/A can be opened. Until then the original file remains. You can open the PDF/A via the table. You can retrieve the original files via the version management function.**
- **The functions cut, copy, paste, export selected pages and add pages are not available for PDF files.**
- **The system recognises separator pages and empty pages and automatically hides them - if not disabled.**

We recommend the use of separator pages so that you can scan documents as a batch without having to separate the documents manually in ecoICE afterwards. Separator pages signal to the system that a new document is about to begin. The system automatically splits the documents and reads them in individually. A print template can be downloaded at ecoDMS website.

1. Print the two-page document (user-defined amount) double-sided so that the letter "T" is on the front side and on the reverse side of an A4 sheet (duplex method).
2. Always put a separator page between the end of one document and the beginning of the next document.

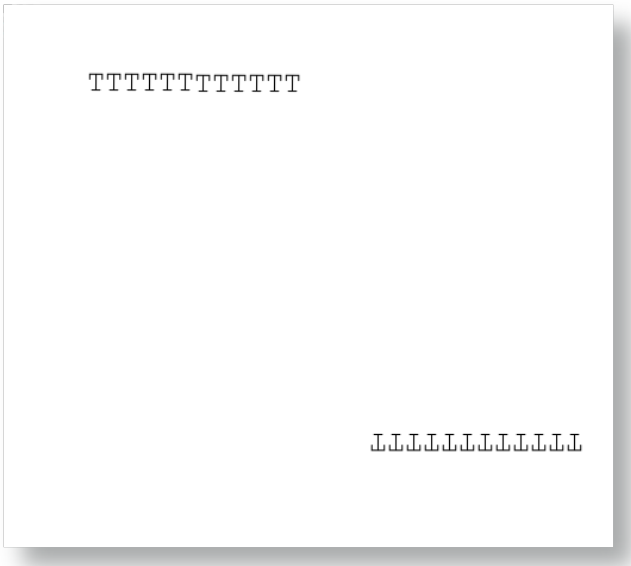

Fig. (similar) 5.4: Separator Page

5.5 Document Orientation

Before you archive, ensure that the individual pages are lying the right way round. The text should always be readable from left to right. This is important for the full text indexing. If necessary, you can turn the pages in this client.

5.6 Statistics

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **This function is only visible and executable for users with administrator rights.**

The statistics document the document processes and display them in a diagram. Using the statistics, you can follow each step of the route a document takes within the "scan processing software". The documents are displayed in the statistics until they have been archived.
To open statistics complete the following steps:

1. Click menu “Edit - Show Statistics”.
2. The “Statistics dialogue box” opens.
   a) In the "Process List" area you can select the desired process / document.
   b) Click “Reload Process List” to reload all current processes.
   c) Click “Reload View” to reload the current process.
   d) Enable "Reload View Automatically" to update statistics automatically.

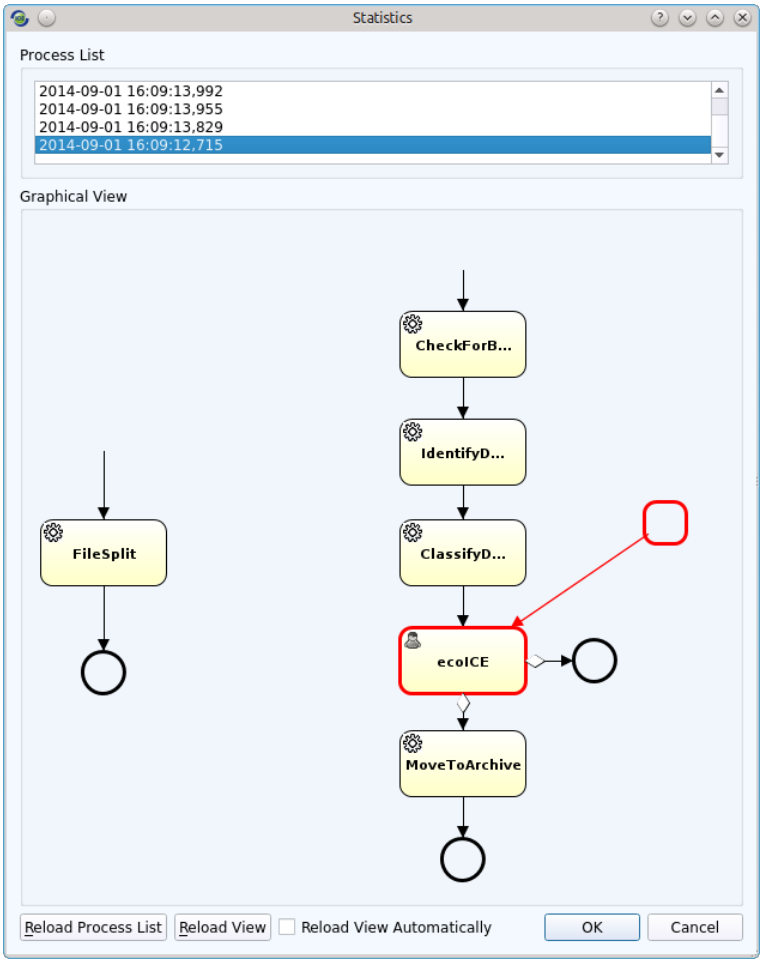

Fig. (similar) 5.5: Statistics

6 Call Up Documents

The documents are loaded and displayed one after the other in this application.

6.1 Request Documents

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **If several classification templates are recognised for a document, they are displayed on tabs in the classification dialogue box. Delete all tabs that do not apply BEFORE archiving. Otherwise the document will be classified and archived several times. The DocID would then occur several times. This would result in multiple DocIDs.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**

The scan application continually receives new files and information. The files are scanned for example from other users. The client displays all documents which are visible for the user. To view and update the documents and classifications, you have the followings options:

1. To do this, click the icon "Request Documents (F5)" on the toolbar **or**
2. Enter this shortcut: F5 **or**
3. When the client restarts, it automatically retrieves and updates the documents and classifications.

Fig. (similar) 6.1: Icon - Request Documents

6.2 Import Documents

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**

With this function you can load TIFF or PDF files from the file system into ecoICE. Please note that in this case the separator page function do not work. Complete the following steps:

1. Select the "Import" function. There are the following options:
   a) Click menu "File - Import" **or**
   b) Enter this shortcut: Ctrl + I
2. A dialogue box opens.

a) Select the TIFF or PDF file from your file system.
b) Then confirm your selection with "Open" .
c) The document is now loaded into the client.

Fig. (similar) 6.2: Icon - Import Documents

6.3 Next Document

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**

The documents are loaded and displayed one after the other in this application. You can switch between the documents. To skip to the next document, you have the following options:

1. Click the toolbar icon “Next Document” **or**
2. Click menu “Navigation - Next Document” **or**
3. Enter this shortcut: Ctrl + Arrow right

Fig. (similar) 6.3: Icon - Next Document

6.4 Previous Document

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**

The documents are loaded and displayed one after the other in this application. You can switch between the documents. To skip to the next document, you have the following options:

1. Click the toolbar icon “Previous Document” **or**
2. Click menu “Navigation - Previous Document” **or**
3. Enter this shortcut: Ctrl + Arrow left

Fig. (similar) 6.4: Icon - Previous Document

7 Edit Documents

You can use various functions to edit the documents requested via ecoICE before they are archived.

7.1 Unlock Documents

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **This function is only visible and executable for users with administrator rights.**

Documents can only be edited and classified in ecoICE if they are not locked by another user and if the server connection is robust. If this is not the case, the documents are locked. If required, the administrator can unlock the documents. Complete the following steps:

1. Select the document.
2. Click the toolbar icon “Unlock Document”.

Fig. (similar) 7.1: Icon - Unlock Document

7.2 Copy, Cut and Paste Pages

You can copy, cut and paste pages.

7.2.1 Cut

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **The functions cut, copy, paste, export selected pages and add pages are not available for PDF files.**
- **In order to classify and archive a document, the changes must first be saved.**

If a document includes multiple pages, selected pages can be cutted and pasted in another position or document. Complete the following steps:

1. Select the pages you want to cut in the “Thumbnails” area. (Press and hold the "CTRL" key to select several documents).
2. Use the function “Cut”. To use the function, there are several options:
   a) Click menu “Edit - Cut” **or**
   b) Right mouse click a selected page - “Cut” **or**

c) Enter this shortcut: Ctrl + X

3. The selection is cutted and copied to the clipboard.

Fig. (similar) 7.2: Icon - Cut

7.2.2 Paste

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **The functions cut, copy, paste, export selected pages and add pages are not available for PDF files.**
- **In order to classify and archive a document, the changes must first be saved.**

Pages that are cut and copied are automatically copied to the clipboard and can be inserted anywhere in this application.

1. Select the pages you want to cut in the “Thumbnails” area. (Press and hold the "CTRL" key to select several documents).
2. Use the function “Paste”. To use the function, there are several options:
   a) Click menu “Edit - Paste” **or**
   b) Right mouse click a selected page - “Paste” **or**
   c) Enter this shortcut: Ctrl + V
3. The selection is pasted to the document.

Fig. (similar) 7.3: Icon - Einfügen

7.2.3 Copy

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **The functions cut, copy, paste, export selected pages and add pages are not available for PDF files.**
- **In order to classify and archive a document, the changes must first be saved.**

Pages that are copied are automatically copied to the clipboard and can be inserted anywhere in this application.

1. Select the pages you want to copy in the “Thumbnails” area. (Press and hold the "CTRL" key to select several documents).
2. Use the function “Copy”. To use the function, there are several options:
   a) Click menu “Edit - Copy” **or**

b) Right mouse click a selected page - “Copy” **or**

c) Enter this shortcut: Ctrl + C

3. The selection is copied to the clipboard.

Fig. (similar) 7.4: Icon - Copy

7.3 Rotate Pages

If necessary, you can rotate the pages of a document.

7.3.1 Rotate left

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **The functions cut, copy, paste, export selected pages and add pages are not available for PDF files.**
- **In order to classify and archive a document, the changes must first be saved.**

With this tool, selected page(s) can be rotated 90 degrees to the left.

1. Select the pages you want to rotate in the “Thumbnails” area. (Press and hold the "CTRL" key to select several documents).
2. Use the function “Rotate Left”. To use the function, there are several options:
   a) Click menu “View - Rotate Left” **or**
   b) Right mouse click a selected page - “Rotate Left” **or**
   c) Click the toolbar icon “Rotate Left” **or**
   d) Enter this shortcut: Ctrl + Shift + L

Fig. (similar) 7.5: Icon - Rotate Left

7.3.2 Rotate Right

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **The functions cut, copy, paste, export selected pages and add pages are not available for PDF files.**
- **In order to classify and archive a document, the changes must first be saved.**

With this tool, selected page(s) can be rotated 90 degrees to the right.

1. Select the pages you want to rotate in the “Thumbnails” area. (Press and hold the "CTRL" key to select several documents).
2. Use the function “Rotate Right”. To use the function, there are several options:
   a) Click menu “View - Rotate Right” **or**
   b) Right mouse click a selected page - “Rotate Right” **or**
   c) Click the toolbar icon “Rotate Right” **or**
   d) Enter this shortcut: Ctrl + Shift + R

Fig. (similar) 7.6: Icon - Rotate Right

7.3.3 Rotate 180 Degrees

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **The functions cut, copy, paste, export selected pages and add pages are not available for PDF files.**
- **In order to classify and archive a document, the changes must first be saved.**

With this tool, you can rotate selected page(s) 180 degrees.

1. Select the pages you want to rotate in the “Thumbnails” area. (Press and hold the "CTRL" key to select several documents).
2. Use the function “Rotate 180°”. To use the function, there are several options:
   a) Click menu “View - Rotate 180°” **or**
   b) Right mouse click a selected page - “Rotate 180°” **or**
   c) Click the toolbar icon “Rotate 180°” **or**
   d) Enter this shortcut: Ctrl + R

Fig. (similar) 7.7: Icon - Rotate 180°

7.4 Export Pages

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **The functions cut, copy, paste, export selected pages and add pages are not available for PDF files.**
- **In order to classify and archive a document, the changes must first be saved.**

You can export selected pages of a document and save them in a file.

1. Select the pages you want to rotate in the “Thumbnails” area. (Press and hold the "CTRL" key to select several documents).
2. Use the function “Export Selected Page(s)”. To use the function, there are several options:
   a) Click menu “Edit - Export Selected Page(s)” **or**
   b) Right mouse click a selected page - “Export Selected Page(s)” **or**
   c) Click the toolbar icon “Export Selected Page(s)” **or**
   d) Enter this shortcut: Ctrl + E
3. Select the destination path and enter a filename.
4. Confirm your entry with “Save” or cancel the process with “Cancel”.

Fig. (similar) 7.8: Icon - Export Selected Page(s)

7.5 Add Pages

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **The functions cut, copy, paste, export selected pages and add pages are not available for PDF files.**
- **In order to classify and archive a document, the changes must first be saved.**

You can add more pages to existing TIFF files.

1. Select the document.
2. Use the function “Add Page(s)”. To use the function, there are several options:
   a) Click menu “Edit - Add Page(s)” **or**
   b) Right mouse click a selected page - “Add Page(s)” **or**
   c) Click the toolbar icon “Add Page(s)” **or**
   d) Enter this shortcut: Ins
3. Select the destination path and choose file.
4. Confirm your selection with “Open” or cancel the process with “Cancel”.

Fig. (similar) 7.9: Icon - Export Selected Page(s)

7.6 Delete Pages

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **The functions cut, copy, paste, export selected pages and add pages are not available for PDF files.**
- **In order to classify and archive a document, the changes must first be saved.**

You can delete selected pages.

1. Select the pages you want to delete in the “Thumbnails” area. (Press and hold the "CTRL" key to select several documents).
2. Use the function “Delete Selected Page(s)”. To use the function, there are several options:
   a) Click menu “Edit - Delete Selected Page(s)” **or**
   b) Right mouse click a selected page - “Delete Selected Page(s)” **or**
   c) Click the toolbar icon “Delete Selected Page(s)” **or**
   d) Enter this shortcut: Del
3. Confirm the message with “Yes” or cancel the process with “No”.

Fig. (similar) 7.10: Icon - Delete Selected Page(s)

7.7 Split Pages

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **The functions cut, copy, paste, export selected pages and add pages are not available for PDF files.**
- **In order to classify and archive a document, the changes must first be saved.**

With this function you can separate pages in a document which you can add as a new document.

1. Select the pages you want to split in the “Thumbnails” area. (Press and hold the "CTRL" key to select several documents).
2. Use the function “Split Document”. To use the function, there are several options:
   a) Click the toolbar icon “Split Document” **or**
   b) Enter this shortcut: F7
3. The dialogue box shows the modified current document and the new document.
4. Confirm the process with “OK” or cancel it with “Cancel”.
5. The divided pages are inserted in the last position in the client.

Fig. (similar) 7.11: Icon - Split Document

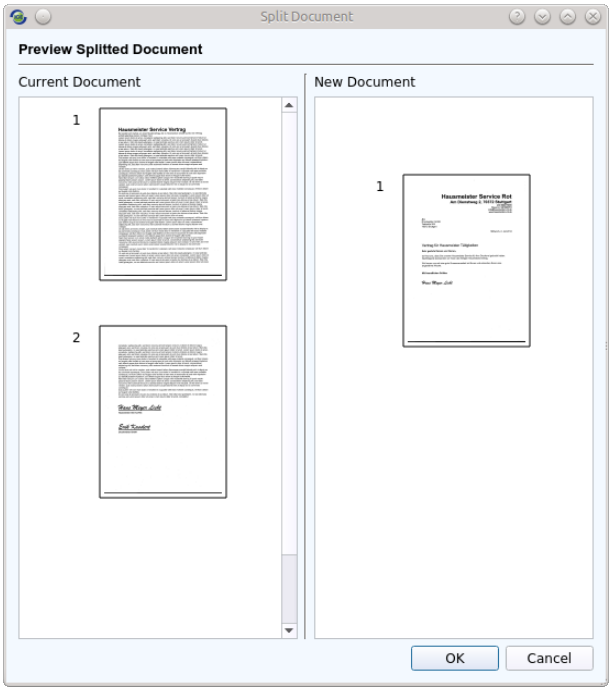

Fig. (similar) 7.12: Window - Split Document

7.8 Move Pages

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **The functions cut, copy, paste, export selected pages and add pages are not available for PDF files.**
- **In order to classify and archive a document, the changes must first be saved.**

The order of pages within a document can be changed. To move page(s), complete the following steps:

1. Select the pages you want to move in the “Thumbnails” area. (Press and hold the "CTRL" key to select several documents).
2. Move the page(s) by pressing the mouse button to the new position.

7.9 Swap Pages

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **The functions cut, copy, paste, export selected pages and add pages are not available for PDF files.**

- **In order to classify and archive a document, the changes must first be saved.**

The order of pages within a document can be changed. To swap the position of page(s), complete the following steps:

1. Select the pages you want to swap in the “Thumbnails” area. (Press and hold the "CTRL" key to select several documents).
2. Move the page onto another page.
3. When the two pages touch, two arrows appear which signal and execute the swap.

7.10 Zoom Pages / View

The software includes various zoom functions for the display of pages.

7.10.1 Zoom Out

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**

The software includes various zoom functions for the display of pages. To zoom out, complete the following steps:

1. Select the page which you want to view in the “Thumbnails” area.
2. Use the function “Zoom Out”. To use the function, there are several options:
   a) Click menu “View - Zoom Out” **or**
   b) Click the toolbar icon “Zoom Out” **or**
   c) Enter a percentage value for the view in the spinbox **or**
   d) Click the bottom arrow in spinbox **or**
   e) Enter this shortcut: Alt + -

Fig. (similar) 7.13: Icon - Zoom Out

7.10.2 Zoom In

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**

The software includes various zoom functions for the display of pages. To zoom in, complete the following steps:

1. Select the page which you want to view in the “Thumbnails” area.
2. Use the function “Zoom In”. To use the function, there are several options:
   a) Click menu “View - Zoom In” **or**
   b) Click the toolbar icon “Zoom In” **or**
   c) Enter a percentage value for the view in the spinbox **or**
   d) Click the top arrow in spinbox **or**

e) Press right mouse button and select the area which you want to zoom in in the “view” window **or**

f) Enter this shortcut: Alt + +

Fig. (similar) 7.14: Icon - Zoom In

7.10.3 Fit

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**

The software includes various zoom functions for the display of pages. To fit in, complete the following steps:

1. Select the page which you want to view in the “Thumbnails” area.
2. Use the function “Fit”. To use the function, there are several options:
   a) Click menu “View - Fit” **or**
   b) Click the toolbar icon “Fit” **or**
   c) Double click on the page in the "View" window **or**
   d) Enter this shortcut: Alt + Z

Fig. (similar) 7.15: Icon - Fit

7.11 Select Pages

You have various options to select or mark the pages of a document.

7.11.1 Select All Pages

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**

This function selects all pages of the displayed document simultaneously.

1. Click into “View” area.
2. Use the function “Select All Pages”. To use the function, there are several options:
   a) Click menu “Edit - Select All Pages” **or**
   b) Right click on a page - “Select All Pages" **or**
   c) Enter this shortcut: Crtl + Alt + A

7.11.2 Select Even Pages

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**

With this function you can select all pages with even numbers in a document.

1. Click into "View" area.
2. Use the function "Select All Pages". To use the function, there are several options:
   a) Click menu "Edit - Select Even Pages" **or**
   b) Right click on a page - "Select Even Pages" **or**
   c) Enter this shortcut: Crtl + Alt + G

7.11.3 Select Odd Pages

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**

With this function you can select all pages with odd numbers in a document.

1. Click into "View" area.
2. Use the function "Select Odd Pages". To use the function, there are several options:
   a) Click menu "Edit - Select Odd Pages" **or**
   b) Right click on a page - "Select Odd Pages" **or**
   c) Enter this shortcut: Crtl + Alt + U

7.11.4 Undo Selection

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**

This function can undo the selection of pages in a document.

1. Click into "View" area.
2. Use the function "Undo Selection". To use the function, there are several options:
   a) Click menu "Edit - Undo Selection" **or**
   b) Right click on a page - "Undo Selections" **or**
   c) Enter this shortcut: Crtl + Shift + A

7.11.5 Reverse Selection

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**

All pages are marked, except the one(s) you have already selected.

1. Click into “View” area.
2. Use the function “Reverse Selection”. To use the function, there are several options:
   a) Click menu “Edit - Reverse Selection” **or**
   b) Right click on a page - “Reverse Selections" **or**
   c) Enter this shortcut: Crtl + Shift + U

7.11.6 Next Page

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**

With this function the next page of the current document is displayed in the "View" window.

1. Click into “View” area.
2. Use the function “Next Page”. To use the function, there are several options:
   a) Click menu “Navigation - Next Page” **or**
   b) Right click on a page - “Next Page" **or**
   c) Enter this shortcut: Crtl + Shift + Arrow down

7.11.7 Previous Page

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**

With this function the previous page of the current document is displayed in the "View" window.

1. Click into “View” area.
2. Use the function “Next Page”. To use the function, there are several options:
   a) Click menu “Navigation - Next Page” **or**
   b) Right click on a page - “Next Page" **or**
   c) Enter this shortcut: Crtl + Shift + Arrow down

7.12 Close Documents

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **Closed documents are not removed from the server.**
- **Every time the programme launches, all available, scanned documents are automatically retrieved.**
- **With a click on the icon -Request Documents- all available, scanned documents are automatically reloaded.**

You have various options for closing a document.

1. Use the function “Close”. To use the function, there are several options:
   a) Click menu “File - Close” **or**
   b) Enter this shortcut: Crtl + Alt + C

7.13 Close All Documents

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **ecoICE and the Scaninput folder always read TIFF and PDF files with the recommended resolution of 200-300 DPI (recommended: black and white or shades of grey).**
- **Closed documents are not removed from the server.**
- **Every time the programme launches, all available, scanned documents are automatically retrieved.**
- **With a click on the icon -Request Documents- all available, scanned documents are automatically reloaded.**

If you do not want to exit the application but want to close all opened documents, you have the following options:

1. Use the function "Close". To use the function, there are several options:
   a) Click menu "File - Close All" **or**
   b) Enter this shortcut: Crtl + Shift + C

8 Classification

Die “Klassifizierung” ist eine Art “Bindeglied” zwischen Dokument und Archiv. Hier können für jede archivierte Datei unter anderem der virtuelle Zielordner in ecoDMS, die Dokumentenart, der Status, die Zuständigkeiten und viele weitere Informationen (Metadaten) erfasst werden. Durch die Vergabe dieser Details können die Dokumente übersichtlich und detailliert abgelegt werden und sind –Alternativ und/oder ergänzend zur “Volltextsuche”– schnell wieder auffindbar.

8.1 Classification Dialogue Box

You have several methods and options to classify documents. The “Classification Dialogue Box” is very important. This includes all stored "classification information". For almost any archiving the "Classification Dialog Box" is relevant.

8.1.1 Change order of Attributes

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**

The order of the "classification attributes" depends on the document type. Please refer to the section "Settings -> Document Types & Retention Periods" in the ecoDMS manual for more details.

8.1.2 Show/Hide Attributes

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**

The display of the "classification attributes" depends on the document type. Please refer to the section "Settings -> Document Types & Retention Periods" in the ecoDMS manual for more details.

8.1.3 Undo

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**

The "Undo" button reverts all previously made classification settings and returns the classification of the selected document to its last saved state. If, for example, ecoDMS recognises a "classification template", you can reset the automatic "classification" by clicking the Undo button for the specific document.

8.2 Enter Classification Attributes

There are various "classification attributes" available for the "classification" of archived documents. A distinction is made between "standard attributes" that are integrated in the system and "user-defined attributes". The following chapters explain the "Standard Attributes".

8.2.1 DocID

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**
- **A user can only see the folders, documents and classifications for which the user has a permission.**
- **You can install server and clients in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.**

DocID stands for "Document Identification Number". A sequential document identification number is automatically allocated to each archived document. The user cannot edit or enter the DocID manually.

8.2.2 Main Folder

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**
- **A user can only see the folders, documents and classifications for which the user has a permission.**
- **You can install server and clients in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.**

The main folders are determined by the folder structure and are allocated automatically. The user cannot create the main folder manually.

- If you have not yet selected a folder, the entry "Not assigned" is displayed. As soon as you have selected a folder from the folder structure, the system automatically recognises and enters the associated main folder.
- For more information on this topic, please refer to the chapter on "Settings - Folder Structure".

8.2.3 Folder

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **You can also create folders directly through the classification dialogue box or the folder structure if you have the according permission.**
- **Tip: If the folder window is open, you can jump directly to the required folder by entering the first letters or numbers of the folder name (also see Folder Search).**

- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**
- **A user can only see the folders, documents and classifications for which the user has a permission.**
- **You can install server and clients in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.**

Folders are determined by the "folder structure" and can either be selected manually or automatically via "classification templates" and/or via the "folder recognition". The folder determines the virtual file destination in ecoDMS. If you have not yet selected a folder, the entry "Not assigned" is displayed. In the following you will learn how to select a folder:

8.2.3.1 Classification Dialogue Box (Included in all ecoDMS Components)

1. Select the entry field for the "Folder" attribute in the "Classification" dialogue box.
2. Open the "Folder Structure":
   a) Either by double-clicking the entry field **or**
   b) By entering the letter "e" (edit).
3. Select the folder
   a) by double-clicking it in the "Folder Structure" **or**
   b) by entering the folder name, the key, or deposited keywords into the "Folder Structure".
      i. In this case an input window opens.
      ii. ecoDMS selects the folder you searched for. Use the "F3" key to continue the search.
      iii. Confirm your entry selection with the "Enter" key.

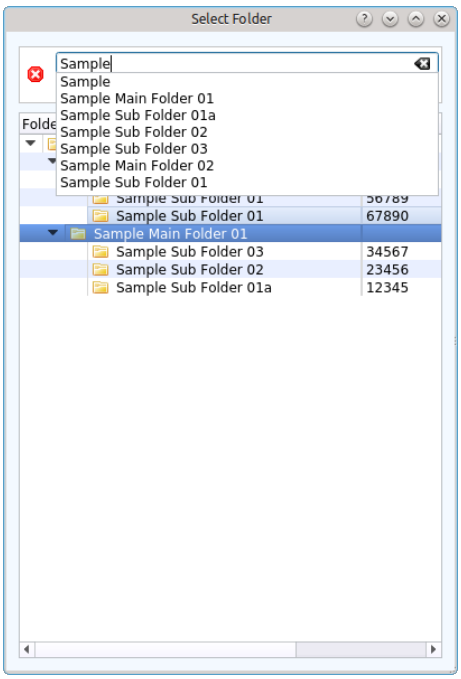

Fig. (similar) 8.1: Searching for Folders

8.2.3.1.1 Copy & Paste Preview Content

- **The preview in the classification dialogue box is only displayed for PDF documents and files that are archived via the ecoDMS plug-ins or the PDF/A printer.**

You can copy content from the “view” window. To do so, complete the following steps:

1. In the "Classification" dialogue box, select the entry field for the "Folder" attribute.
2. Press the "Ctrl" key and right-click the area where you want to paste the content, in the "preview".
3. If you enter the "Folder" attribute, the "Folder Structure" opens. The copied content is recorded as a search term for the folder.
4. Select the folder and confirm your selection with "Enter".

Fig. (similar) 8.2: Icon - Copy Text from Document

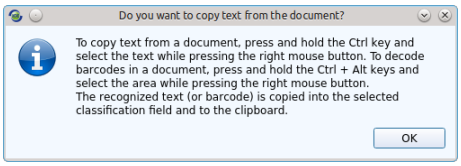
Do you want to copy text from the document?
To copy text from a document, press and hold the Ctrl key and select the text while pressing the right mouse button. To decode barcodes in a document, press and hold the Ctrl + Alt keys and select the area while pressing the right mouse button.
The recognized text (or barcode) is copied into the selected classification field and to the clipboard.
OK

Fig. (similar) 8.3: Explanation: Copy Text from Document

8.2.4 Comment

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**
- **A user can only see the folders, documents and classifications for which the user has a permission.**
- **You can install server and clients in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.**

The "Comment" box is a free text box which can be filled with any content. You can either enter the comment manually or ecoDMS can automatically enter the comment via the "classification templates", which can be recognised from the filename. In the following you will learn how to enter the attribute:

8.2.4.1 Classification Dialogue Box (Included in all ecoDMS Components)

1. Select the entry field for the "Comment" attribute in the "Classification" dialogue box.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).
2. Enter the comment.

8.2.4.1.1 Copy & Paste Preview Content

- **The preview in the classification dialogue box is only displayed for PDF documents and files that are archived via the ecoDMS plug-ins or the PDF/A printer.**

You can copy content from the “view” window. To do so, complete the following steps:

1. In the "Classification" dialogue box, select the entry field for the "Comment" attribute.
2. The following options are available for copying content:
   a) Overwrite existing text in the attribute of a free text field (for example, comment):
   Press the "Ctrl" key and right-click an area to select it in the scanned document.
   b) Add texts to an existing text in the attribute of a free text field (for example, comment):
   Press the "Ctrl" key and the "Shift" key and right-click an area to select it in the scanned document.
   c) Barcode in a document can be decoded and entered as text:
   To decode barcodes in a document, press and hold the Ctrl + Alt keys and select the area while pressing the right mouse button.

Fig. (similar) 8.4: Icon - Copy Text from Document

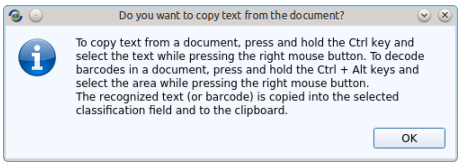
Do you want to copy text from the document?
To copy text from a document, press and hold the Ctrl key and select the text while pressing the right mouse button. To decode barcodes in a document, press and hold the Ctrl + Alt keys and select the area while pressing the right mouse button.
The recognized text (or barcode) is copied into the selected classification field and to the clipboard.
OK

Fig. (similar) 8.5: Explanation: Copy Text from Document

8.2.5 Status

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**
- **A user can only see the folders, documents and classifications for which the user has a permission.**
- **You can install server and clients in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.**

A status provides information about the processing status of a document. As a default, 3 statuses are deposited in the archive:

1. Done
2. Resubmission (please read the chapter "Resubmissions")
3. ToDo

These can be renamed or enhanced by the administrator, but not deleted. You can either assign a status manually or ecoDMS recognises it automatically through the "classification templates" In the following you will learn how to manually select the "status":

8.2.5.1 Classification Dialogue Box (Included in all ecoDMS Components)

1. Select the entry field for the "Status" attribute in the "Classification" dialogue box.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).
2. Select the “Status”.
   a) If you select "Resubmission", the calendar opens to enter the resubmission date.
   b) Select the date in the calendar.
      i. Use the arrow keys (left, right) to switch between the months.
      ii. You can change the month and the year using the navigation in the calendar header.
      iii. Click "Today" to set the current day.
      iv. You can also enter the date directly. The first number is entered in the calendar.
   c) Confirm your entry and selection with "OK".

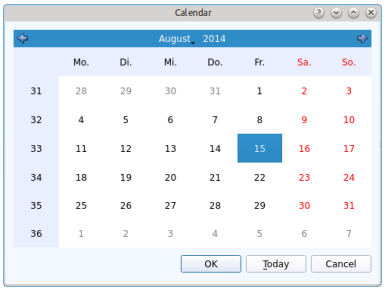

Fig. (similar) 8.6: Calendar - Select Date

8.2.6 Revision

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**
- **A user can only see the folders, documents and classifications for which the user has a permission.**
- **You can install server and clients in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.**

The "revision" is automatically assigned by the system. The "revision" increments by one with each change to the classification of a document. At the same time an entry is made in the "document history". The revision number shows how often a file was changed within the classification AFTER archiving. The user cannot change the DocID. The "revision" only refers to changes within the "classification". You can display details about the "revision" in the "History".

8.2.7 Document Type

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**

- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**
- **A user can only see the folders, documents and classifications for which the user has a permission.**
- **You can install server and clients in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.**

When assigning documents, the type of document (e.g. incoming invoices, outgoing invoices, agreement, offer is specified in "Document Type". We recommend you select the "document type" when classifying each document you archive. This makes the handling and the retrieval of documents much easier. You can either assign a status manually or ecoDMS recognises it automatically through the "classification templates". If you have not yet selected a "document type", the entry "Not assigned" is displayed. In the following you will learn how to manually select the "document type":

8.2.7.1 Classification Dialogue Box (Included in all ecoDMS Components)

1. Select the entry field for the "Document Type" attribute in the "Classification" dialogue box.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).
2. Select the "Document Type".

8.2.8 Last Change

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**
- **A user can only see the folders, documents and classifications for which the user has a permission.**
- **You can install server and clients in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.**

If a change is made to the classification AFTER the archiving process, the date and time of the last change to the document is displayed here. The classification attribute is automatically allocated and cannot be entered manually by the user.

8.2.9 Date

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**
- **A user can only see the folders, documents and classifications for which the user has a permission.**
- **You can install server and clients in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.**

The date is automatically assigned when archiving, but it can be changed if necessary. We recommend you store the actual postal date of receipt of the document as date in ecoDMS. When searching for documents, the actual date can be included in the search. You can either assign a status manually or ecoDMS recognizes it automatically. In the following you will learn how to manually select the "date":

8.2.9.1 Classification Dialogue Box (Included in all ecoDMS Components)

1. Open the "Classification" dialogue box for the document(s).
2. Select the entry field for the "Date" attribute.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).
3. The calendar dialogue box opens. Select the date in the calendar.
   a) Use the arrow keys (left, right) to switch between the months.
   b) You can change the month and the year using the navigation in the calendar header.
   c) Click "Today" to set the current day.
   d) You can also enter the date directly. The first number is entered in the calendar.
4. Confirm your entry and selection with "OK".

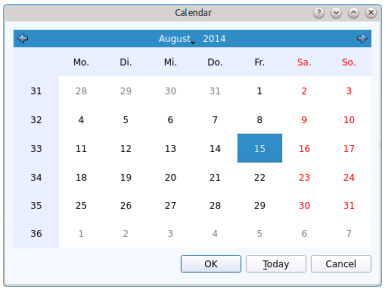

Fig. (similar) 8.7: Calendar - Select Date

8.2.9.1.1 Copy & Paste Preview Content

- **The preview in the classification dialogue box is only displayed for PDF documents and files that are archived via the ecoDMS plug-ins or the PDF/A printer.**

You can copy content from the "view" window. To do so, complete the following steps:

1. In the "Classification" dialogue box, select the entry field for the "Date" attribute.
2. Press the "Ctrl" key and right-click the area where you want to paste the content, in the "preview".

ecoDMS recognises the following date formats:

1. yyyy.MM.dd
2. dd.MM.yyyy
3. dd.MM.yy
4. dd. MMM yyyy
5. dd. MMMM yyyy
6. dd MM yyyy
7. dd MMMM yyyy
8. dd.MMyyyy
9. ddMMyyyy
10. ddMM.yyyy"

Fig. (similar) 8.8: Icon - Copy Text from Document

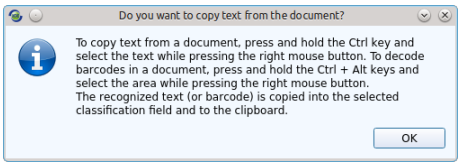
Do you want to copy text from the document?
To copy text from a document, press and hold the Ctrl key and select the text while pressing the right mouse button. To decode barcodes in a document, press and hold the Ctrl + Alt keys and select the area while pressing the right mouse button.
The recognized text (or barcode) is copied into the selected classification field and to the clipboard.
OK

Fig. (similar) 8.9: Explanation: Copy Text from Document

8.3 Permissions

To ensure that the documents can only be viewed and edited by authorised persons, you can assign individual permissions to each document and each folder in ecoDMS. This ensures confidentiality of the documents. You can assign permissions in the Classification dialogue box.

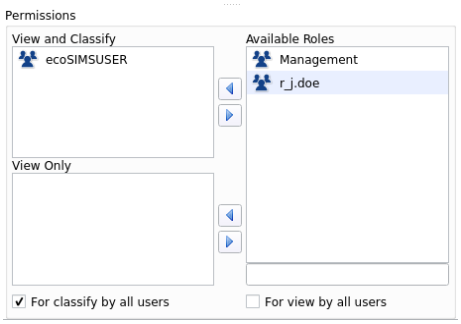

Fig. (similar) 8.10: Classification Dialogue Box - Permissions

8.3.1 Assign Permissions

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **When you assign documents and folders, we recommend you always work with user groups and not with individual users.**
- **Please note that at least one user or role (group) must be assigned to the -View and Classify- permission field.**
- **A user can only see the folders, documents and classifications for which the user has a permission.**

To assign permissions, complete the following steps:

8.3.1.1 View and Classify

This area contains all "roles" (users, groups) that are allowed to view and classify the document after the "classification" is saved. To assign "roles" to this area, complete the following steps:

1. Select the "roles" (users, groups) in the "Available Roles" area.
   a) If you hold the "Ctrl" key, you can select several roles simultaneously.
2. Drag and drop the "roles" into the "View and Classify" area.
   a) Alternatively, you can assign the "roles" to the area with the upper arrow icon (arrow right).

8.3.1.2 View Only

This area contains all "roles" (users, groups) that are only allowed to view but not classify the document after the "classification" is saved. To assign "roles" to this area, complete the following steps:

1. Select the "roles" (users, groups) in the "Available Roles" area.
   a) If you hold the "Ctrl" key, you can select several roles simultaneously.
2. Drag and drop the "roles" into the "View Only" area.
   a) Alternatively, you can assign the "roles" to the area with the lower arrow icon (arrow left).

8.3.1.3 For Classify by All Users

If the "For Classify by All Users" command is enabled, the document can be viewed and classified by all users after the "classification" is saved. Exception: The associated folder limits access as it has further permissions.

- The "ecoSIMSUSER" role is entered by the system in the "View and Classify" area when the command is enabled.

8.3.1.4 For View by All Users

If the "For View by All Users" command is enabled, the document can be viewed by all users after the "classification" is saved. Exception: The associated folder limits access as it has further permissions.

- The "ecoSIMSUSER" role is entered by the system in the "View Only" area when the command is enabled.

8.3.2 Remove Permissions

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **When you assign documents and folders, we recommend you always work with user groups and not with individual users.**
- **Please note that at least one user or role (group) must be assigned to the -View and Classify- permission field.**
- **A user can only see the folders, documents and classifications for which the user has a permission.**

To remove permissions, complete the following steps:

8.3.2.1 View and Classify

This area contains all "roles" (users, groups) that are allowed to view and classify the document after the "classification" is saved. To remove a profile from the "Roles" area, complete the following steps:

1. Select the "roles" (users, groups) in the "View and Classify" area.
   a) If you hold the "Ctrl" key, you can select several roles simultaneously.
2. Drag and drop the "roles" into the "Available Roles" area.
   a) Alternatively, you can assign the "roles" to the area with the upper arrow icon (arrow right).

8.3.2.2 View Only

This area contains all "roles" (users, groups) that are only allowed to view but not classify the document after the "classification" is saved. To remove "roles" from this area, complete the following steps:

1. Select the "roles" (users, groups) in the "View Only" area.
   a) If you hold the "Ctrl" key, you can select several roles simultaneously.
2. Drag and drop the "roles" into the "Available Roles" area.
   a) Alternatively, you can assign the "roles" to the area with the lower arrow icon (arrow right).

8.3.2.3 For Classifiy by All Users

If the "For Classify by All Users" command is disabled, the document cannot be viewed and classified by all users after the "classification" is saved (please note the folder permission).

- The "ecoSIMSUSER" role is removed from the system in the "View and Classify" area when the command is disabled.

8.3.2.4 For View by All Users

If the "For View by All Users" command is disabled, the document cannot be viewed by all users after the "classification" is saved (please note the folder permission).

- The "ecoSIMSUSER" role is removed from the system in the "View Only" area when the command is disabled.

8.4 Multiple Classify

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Removing tabs for Multiple Classification is only possible till the Classification was saved.**
- **A user can only see the folders, documents and classifications for which the user has a permission.**
- **The preview in the classification dialogue box is only displayed for PDF documents and files that are archived via the ecoDMS plug-ins or the PDF/A printer.**

You can create several “classifcations” for documents by using the function “Multiple Classification”.The document can be archived, for example, in different folders in ecoDMS. “Multiple Classification” allows a document to be classified several times (internal linking) without having to deposit it in an archive again. **After saving, the DocID for the respective document in ecoDMS is assigned several times.**

8.4.1 Add Multiple Classification

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Removing tabs for Multiple Classification is only possible till the Classification was saved.**
- **A user can only see the folders, documents and classifications for which the user has a permission.**

1. Enter the “classification information” (if not yet available)
2. To add “Multiple Classification” click the icon “Add Multiple Classification”.
   a) Another classification window opens as a tab
3. Enter the additional information
   a) If necessary, you can add as many tabs as you like.

Fig. (similar) 8.11: Icon - Classification

Fig. (similar) 8.12: Icon - Add Multiple Classification

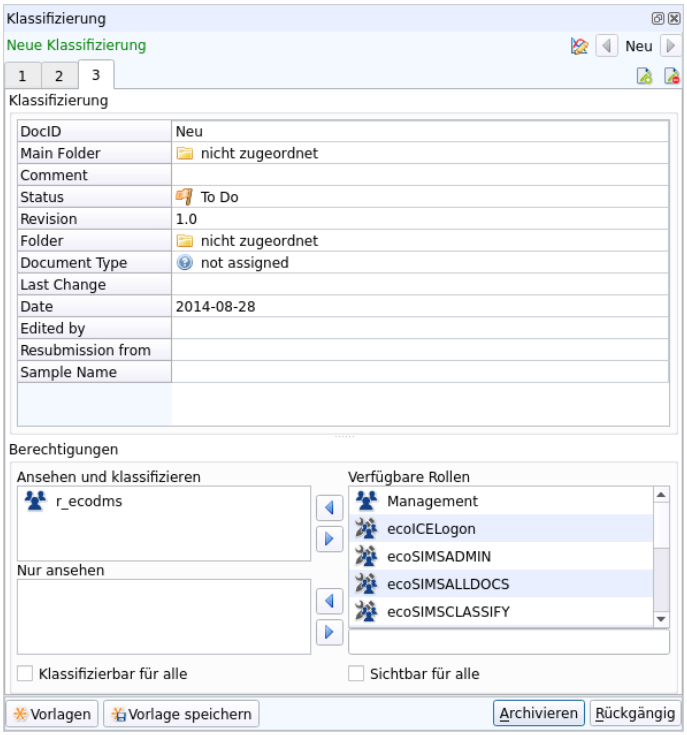

Fig. (similar) 8.13: Multiple Classification

8.4.2 Remove Muliple Classification

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Removing tabs for Multiple Classification is only possible till the Classification was saved.**
- **A user can only see the folders, documents and classifications for which the user has a permission.**

1. Enter the "classification information" (if not yet available)
2. To remove "Multiple Classification" click the icon "Remove Multiple Classification".

Fig. (similar) 8.14: Icon - Classification

Fig. (similar) 8.15: Icon - Remove Multiple Classification

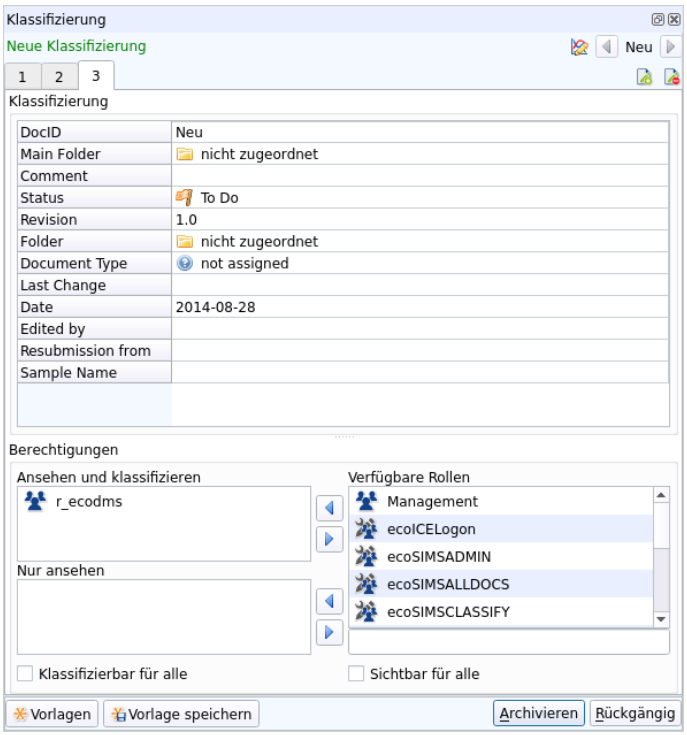

Fig. (similar) 8.16: Multiple Classication

8.5 Set Default Classification

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Please note that these settings refer to the individual workstation and are not stored in the user profile.**
- **The standard classification is loaded only in this program (if no other template was detected).**
- **The standard classification exists until the function -reset classification- is clicked.**

You can define a default classification for your workplace. This is loaded by default when a document is scanned / loaded in this program and no other template was detected.

1. Enter the classification attributes in the "Classification Dialogue Box" which you want to set as default classification.
2. Right-click in the "Permissions" area.
3. Click "Set as Default Classification"

8.6 Reset Default Classification

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Please note that these settings refer to the individual workstation and are not stored in the user profile.**

- **Die Standardklassifizierung bleibt nur solange erhalten, bis die Funktion -Zurücksetzen- angeklickt wird.**

You can reset a classification and the settings for a “Default Classification”.

1. Right-click in the “Permissions” area in the “Classification Dialogue Box”
2. Click “Reset Default Classification”

8.7 Classification Dialogue Box

You have several methods and options to classify documents. The “Classification Dialogue Box” is very important. This includes all stored "classification information". For almost any archiving the "Classification Dialog Box" is relevant.

8.7.1 Change Sequence of Attributes

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Please note that these settings refer to the individual workstation and are not stored in the user profile.**

You can specify the order of the classification attributes by moving the rows with the mouse.

8.7.2 Show / Hide Attributes

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Please note that these settings refer to the individual workstation and are not stored in the user profile.**

You can show or hide individual classification attributes as follows:

1. Right-click the mouse in the left column (where the names of the classification attributes are listed)
2. Click the button "Show/Hide Row(s)"
   a) Select the required attributes by setting the mark (tick).
   b) Disable the not needed attributes by removing the mark (tick).

8.7.3 Undo

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**

The "Undo" button erases all settings you just made to the classification and reverts the classification of the selected document to its last saved state

9 Classification Templates: Automatic Archiving & Classification

The classification and barcode templates created with the designer allow automatic assignment, classification and archiving of documents. Both configuration and recognition are based on forms, keywords and/or barcodes from previously stored classification templates.

9.1 How and When are Templates Applied?

Templates have various applications. Template recognition depends on the file type, content and on the readability and quality of the documents.

9.1.1 Templates are automatically applied for...

- **If several classification templates are recognised for a document, they are displayed on tabs in the classification dialogue box. Delete all tabs that do not apply BEFORE archiving. Otherwise the document will be classified and archived several times. The DocID would then occur several times. This would result in multiple DocIDs.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**

1. PDF and TIFF files during standard and drag & drop archiving in ecoDMS (Windows, Ubuntu, Debian, MacOS),
2. PDF and TIFF files of documents scanned in via scaninput (Windows, Ubuntu, Debian, MacOS),
3. files archived via PDF/A printers (Windows, Ubuntu, Debian),
4. files archived via Libre / OpenOffice plug-in (Windows, Ubuntu, Debian, MacOS),
5. files archived via MS Office plug-in, including Outlook (Windows),
6. files archived via Thunderbird add-on (Windows, Ubuntu, Debian)

9.1.2 Manual Template Selection

- **If several classification templates are recognised for a document, they are displayed on tabs in the classification dialogue box. Delete all tabs that do not apply BEFORE archiving. Otherwise the document will be classified and archived several times. The DocID would then occur several times. This would result in multiple DocIDs.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**

1. You can select templates manually in the "Classification" dialogue box and use them for "classification".
2. You can manually start the template recognition after the scanning process via the incoming e-mail processing program for scanned documents (e.g. for imported documents or documents scanned via TWAIN/WIA/SANE).

Fig. (similar) 9.1: Icon - Search for matching Template

9.2 Create and Edit Simple Template

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **This feature requires a licence of the ecoDMS full version but can be tested during the full-demo time and is then automatically disabled until a full licence is activated.**
- **Only 1 template can be saved in the Community Edition (Free4Three).**
- **If you use keywords, all keyword deposited in ecoDMS must exactly match the words in the document. Use unambiguous terms, e.g. the VAT-ID or the customer number of a company.**
- **Automatic template recognition in ecoICE is only possible for readable TIFF or PDF files scanned in via the scaninput folder.**
- **Form templates can be created only for PDF files. Otherwise, the form window is not visible in the Template Designer.**
- **2D barcodes are read in via the formula recognition function. Classification templates stored as barcodes only apply for files that are scanned via the scaninput folder.**
- **Classification templates can be saved on the server for all users.**
- **When scanning via the TWAIN/WIA/SANE interface, and also when manually separating documents in ecoICE, automatic pre-classification is not possible. Templates can also be searched for and selected manually.**
- **Templates are automatically applied for: PDF and TIFF files during standard and drag and drop archiving in ecoDMS (Windows, Ubuntu, Debian, MacOS), PDF and TIFF files for documents scanned in via scaninput (Windows, Ubuntu, Debian, MacOS), files archived via PDF/A printers (Windows, Ubuntu, Debian), files archived via the Libre/ OpenOffice plug-in (Windows, Ubuntu, Debian, MacOS), files archived via the MS Office plug-in, incl. Outlook (Windows), files archived via the Thunderbird add-on (Windows, Ubuntu, Debian)**
- **The template and/or folder recognition for the plug-ins / add-ons is enabled individually for each user in the Classification dialogue box.**
- **The template and/or folder recognition for the scanning process via the scaninput folder is enabled by the administrator through the Settings dialogue box in ecoDMS.**
- **Enter keywords without a hyphen or a comma. The recorded words are "And" -linked. For the detection, all detected items must be included in the document in the same notation.**
- **The preview in the classification dialogue box is only displayed for PDF documents and files that are archived via the ecoDMS plug-ins or the PDF/A printer.**
- **If several classification templates are recognised for a document, they are displayed on tabs in the classification dialogue box. Delete all tabs that do not apply BEFORE archiving. Otherwise the document will be classified and archived several times. The DocID would then occur several times. This would result in multiple DocIDs.**

A classification template is the basis for automatic document assignment. In the template you determine how the document is archived / classified in ecoDMS. To create a "simple template" (without additional form recognition), complete the following steps:

1. Open the "Classification" dialogue box for any document.
2. Execute the "Save Template" function. To do this, you have the following options:
   a) Click the "Save Template" button.
   b) Right-click the mouse in the "Permissions" area and select "Save Classification as Template".
3. The "Template Designer" opens. To create a "simple template" (without additional form recognition), complete the following steps:
4. **Name:** Enter a name for the template. Use the name to retrieve and recognise the template.
5. **Keyboard shortcut:** As an option, you can store a shortcut. You can use this shortcut later to open the "classification template" manually in the "Classification" dialogue box.
   a) Use the "Reset" button to remove the "shortcut".
6. **Automatic recognition:** You can only enable this field in combination with a "formula template". If the "Automatic Recognition" command is enabled, the system reads the document header and footer in the background and saves them as an important attribute for the recognition of the "classification template".
   a) If no further criteria (keywords) are stored, the document header and footer must match the template to allow automatic pre-classification.
   b) If you want to enter additional "keywords", the "keywords" and the document header and footer must match the template to enable automatic pre-classification.
7. **Keywords:** Enter the keywords to trigger the automatic "classification template". The "template" is only recognised and executed if the document you are searching for contains exactly these keywords. If everything matches and recognition is successful, the classification information is loaded.
   a) **Please follow the above notes.**
8. **Barcode:** When creating a classification template, ecoDMS automatically generates a 2D barcode. This contains the "classification information" (attributes and their entered values) and "permissions" (if assigned). You can apply these barcodes to documents independent of "keywords" or other criteria in the template. As a rule you use barcodes for "returning documents", i.e. documents created in-house, which are then signed and returned. The classification information and any permissions stored in the 2D barcodes are only read and applied for classification for files that were scanned in via the scaninput folder. To use the 2D barcode you generated, you have the following options:
   a) Copy the barcode to the clipboard
   b) Save Barcode As... (*.JPG)
9. **Options: Please read the information in the "Dark process: Archiving Documents Automatically" section.** As an option, existing and successfully recognised classification templates can be processed in a "dark process".
   a) To activate "Automatic archiving", you must enable the checkbox "If recognised, automatically store in archive" in the "Options" section of the "Template Designer".
   b) Then select the "Target archive".
10. **Classification:** Fill in the "Classification" dialogue box in the "Template Designer". Assign values that are saved as "classification template" and which you want to be used for "classification" when the template is executed.
    a) Now enable the attributes you want to be used when the "classification template" is executed.
       i. Only the enabled attributes are overwritten when the template is executed. All other attributes remain untouched by the template.
11. **Permissons:** As an option you can enable the "Permissions" for the "Classification Template". In this case the "permissions" stored here are also used for "classification".
12. Save the template by clicking "OK" or cancel the operation with "Cancel".

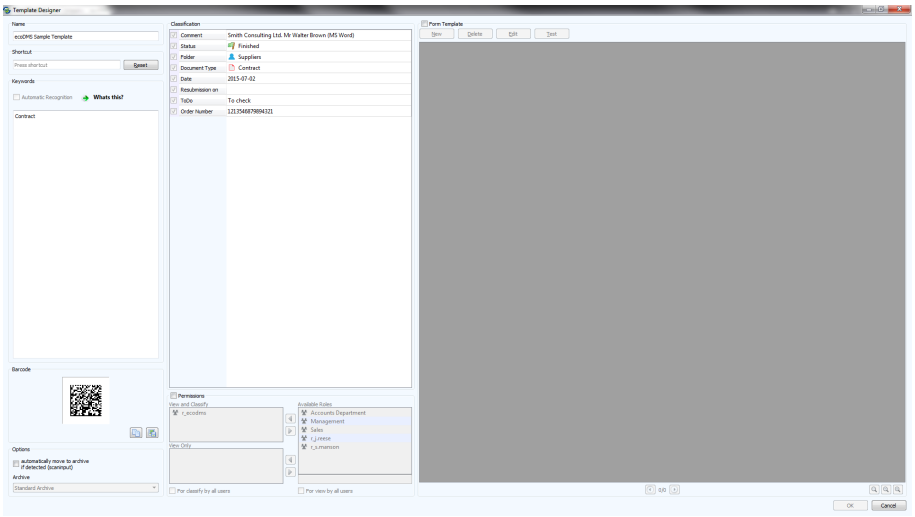

Fig. (similar) 9.2: Classification Template - Simple Template

9.3 Create and Edit a Form Template

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **This feature requires a licence of the ecoDMS full version but can be tested during the full-demo time and is then automatically disabled until a full licence is activated.**
- **Only 1 template can be saved in the Community Edition (Free4Three).**
- **If you use keywords, all keyword deposited in ecoDMS must exactly match the words in the document. Use unambiguous terms, e.g. the VAT-ID or the customer number of a company.**
- **Automatic template recognition in ecoICE is only possible for readable TIFF or PDF files scanned in via the scaninput folder.**
- **Form templates can be created only for PDF files. Otherwise, the form window is not visible in the Template Designer.**
- **2D barcodes are read in via the formula recognition function. Classification templates stored as barcodes only apply for files that are scanned via the scaninput folder.**
- **Classification templates can be saved on the server for all users.**
- **When scanning via the TWAIN/WIA/SANE interface, and also when manually separating documents in ecoICE, automatic pre-classification is not possible. Templates can also be searched for and selected manually.**
- **Templates are automatically applied for: PDF and TIFF files during standard and drag and drop archiving in ecoDMS (Windows, Ubuntu, Debian, MacOS), PDF and TIFF files for documents scanned in via scaninput (Windows, Ubuntu, Debian, MacOS), files archived via PDF/A printers (Windows, Ubuntu, Debian), files archived via the Libre/ OpenOffice plug-in (Windows, Ubuntu, Debian, MacOS), files archived via the MS Office plug-in, incl. Outlook (Windows), files archived via the Thunderbird add-on (Windows, Ubuntu, Debian)**
- **The template and/or folder recognition for the plug-ins / add-ons is enabled individually for each user in the Classification dialogue box.**
- **The template and/or folder recognition for the scanning process via the scaninput folder is enabled by the administrator through the Settings dialogue box in ecoDMS.**

- **Enter keywords without a hyphen or a comma. The recorded words are "And" -linked. For the detection, all detected items must be included in the document in the same notation.**
- **The preview in the classification dialogue box is only displayed for PDF documents and files that are archived via the ecoDMS plug-ins or the PDF/A printer.**
- **If several classification templates are recognised for a document, they are displayed on tabs in the classification dialogue box. Delete all tabs that do not apply BEFORE archiving. Otherwise the document will be classified and archived several times. The DocID would then occur several times. This would result in multiple DocIDs.**

A classification template is the basis for automatic document assignment. In the template you determine how the document is archived / classified in ecoDMS. To create a "simple template" (without additional form recognition), complete the following steps:

1. Open the "Classification" dialogue box for the document / form which you require as template for the future "form recognition". Make sure the document is archived in the TIFF or PDF format. Otherwise the preview for the "Form Template" cannot be displayed.
2. Execute the "Save Template" function. To do this, you have the following options:
   a) Click the "Save Template" button. **or**
   b) Right-click the mouse in the "Permissions" area and select "Save Classification as Template".
3. The "Template Designer" opens. To create a "Form Template", complete the following steps:
4. **Enable the "Form Template" checkbox.**
5. **Name:** Enter a name for the template. Enter a name to retrieve and recognise the template.
6. **Keyboard shortcut:** As an option, you can store a shortcut. You can use this shortcut later to open the "classification template" manually in the "Classification" dialogue box.
   a) Use the "Reset" button to remove the "shortcut".
7. **Automatic recognition:** You can only enable this field in combination with a "form template". The "Form Template" command must be enabled. If the "Automatic Recognition" command is enabled, the system reads the document header and footer in the background and saves them as an important attribute for the recognition of the "classification template".
   a) If no further criteria (keywords) are stored, the document header and footer must match the template to allow automatic pre-classification.
   b) If you want to enter additional "keywords", the "keywords" and the document header and footer must match the template to enable automatic pre-classification.
8. **Keywords:** Enter the keywords to trigger the automatic "classification template". The "template" is only recognised and executed if the document you are searching for contains exactly these keywords. If everything matches and recognition is successful, the classification information is loaded.
   a) **Please follow the above notes.**
9. **Barcode:** When creating a classification template, ecoDMS automatically generates a 2D barcode. This contains the "classification information" (attributes and their entered values) and "permissions" (if assigned). You can apply these barcodes to documents independent of "keywords" or other criteria in the template. As a rule you use barcodes for "returning documents", i.e. documents created in-house, which are then signed and returned. The classification information and any permissions stored in the 2D barcodes are only read and applied for classification for files that were scanned in via the scaninput folder. To use the 2D barcode you generated, you have the following options:
   a) Copy the barcode to the clipboard
   b) Save Barcode As... (*.JPG)
10. **Options: Please read the information in the "Dark process: Archiving Documents Automatically" section.** As an option, existing and successfully recognised classification templates can be processed in a "dark process".

a) To activate "Automatic archiving", you must enable the checkbox "If recognised, automatically store in archive" in the "Options" section of the "Template Designer".

b) Then select the "Target archive".

11. **Classification:** Fill in the "Classification" dialogue box in the "Template Designer". Assign values that you want to save as "classification template" and which you want to be used for "classification" when the template is executed.
    - You can either enter the values manually or
    - read and apply them automatically from the document using a "Form Template"

    a) Then enable the attributes you want to be used when the "classification template" is executed. Only the enabled attributes are overwritten when the template is executed. All other attributes remain untouched by the template.

12. To apply the contents and values of the "classification" with the "classification template", complete the following steps:

    a) Click "New" in the "Form Template" area. The "Form Template" dialogue box opens:

        i. Select the appropriate attribute from the list of available attributes for "form recognition".

        ii. Click the "Colour" box to specify a colour. This is then used when selecting and applying the field information. Tip: Assign a different colour to each attribute!

            A. Confirm your selection with "OK" or cancel the operation with "Cancel".

        iii. Enable the "Options" command to add more details to the "Form Field".

            A. **Allowed characters:** As an option, you can save a list of the allowed characters here. When reading the selected field, only those characters are applied which have previously been allowed for the attribute. Enter the allowed characters without separators or blanks. All characters in the list are declared as "allowed" values, which also includes blanks.
                - If, for example, you want to transfer numbers only from a text, enter the allowed numbers (e.g. 12345) here.
                - If, for example, you want to transfer letters only from a text, enter the allowed letters (e.g. AaBbCcEeFf) here.
                - A combination of numbers, letters, special characters, etc., is also possible.

            B. **Selection is a barcode:** As an option, enable this field if the area you want to read is a barcode. The contents stored in the barcode are applied as the value for the attribute. The form recognition reads contents from both barcodes and 2D barcodes.

        iv. Confirm the operation with "OK" or cancel the operation with "Cancel".

    b) A box displays in the document preview in the colour you selected earlier. Position the box in the area of the document which you want to read and apply for the selected attribute. Make sure that the box frames the exact amount of information you need.

        i. You can adjust the height and the width of the box. To do so, drag the outer points of the box.

        ii. Use the "Zoom" icons to zoom the preview.

        iii. Hold the right mouse button to select and zoom in on areas.

        iv. Double-click the preview to fit the page to the window.

    c) Click "Test" to check the form.

        i. The recognised content is entered as a test in the "classification" dialogue box of the "Template Designer".

    d) You can repeat this process for any further attributes.

13. **Permissions:** As an option you can enable the "Permissions" for the "Classification Template". In this case the "permissions" stored here are also used for "classification".

14. Save the template by clicking "OK" or cancel the operation with "Cancel".

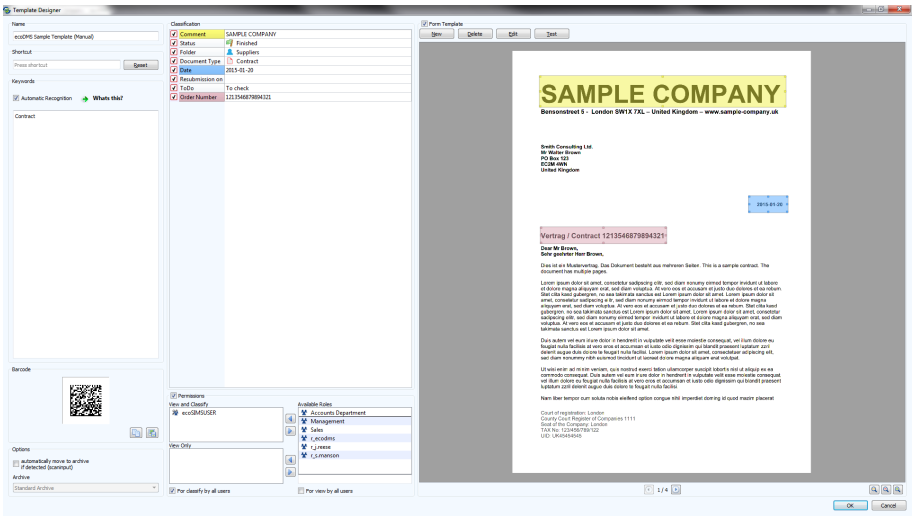

Fig. (similar) 9.3: Classification Template - Form Template

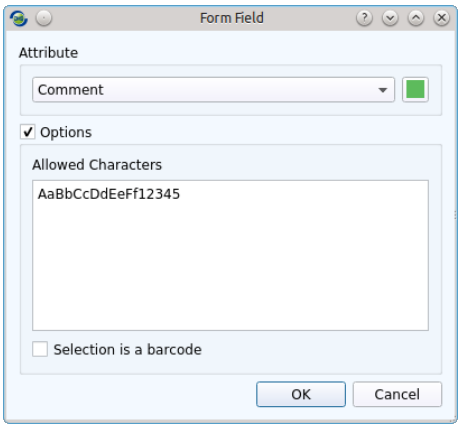

Fig. (similar) 9.4: Classification Template - Create Form Field

9.4 Dark Process: Archiving Documents Automatically

- **Automatic Archiving is only possible for documents retrieved from ecoDMS through the scaninput folder and successfully recognised by the template designer (incoming e-mail processing for scanned documents).**
- **If several classification templates are recognised for a document, the document is classified and archived several times. The DocID for this document would then occur several times.**
- **If several classification templates are recognised for a document, which have different target archives, they are not archived automatically. The document is opened in the scan programme of ecoDMS.**

As an option, existing and recognised classification templates can be processed in a "dark process". Please note that this process is only possible for documents retrieved from ecoDMS through the "scaninput folder" and successfully recognised by the template designer (incoming e-mail processing for scanned documents). To activate the "dark process", complete the following steps:

1. Create a classification template with the ecoDMS "Template Designer".
   a) If you want to activate the "Dark process" for an existing template, you can open the template for editing and configure it accordingly.

2. To activate "Automatic archiving", you must enable the checkbox "If recognised, automatically store in archive" in the "Options" section of the "Template Designer".
   a) Then select the "Target archive".
3. Click the “OK” button to save the template.

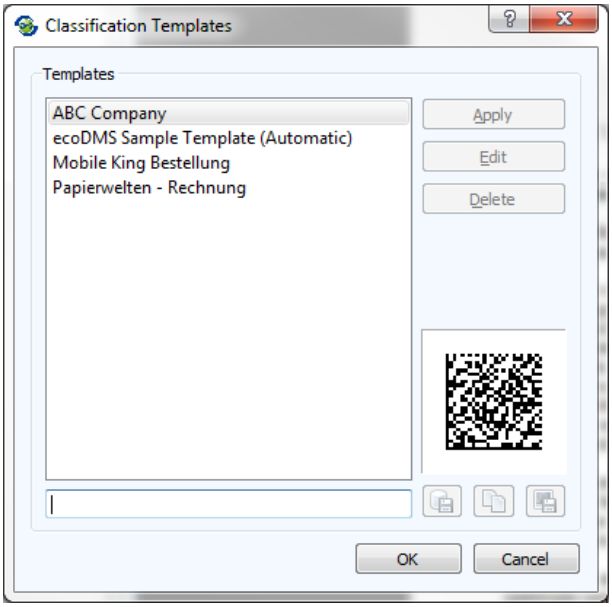

Abbildung 9.5: Overview of Templates - Edit Templates

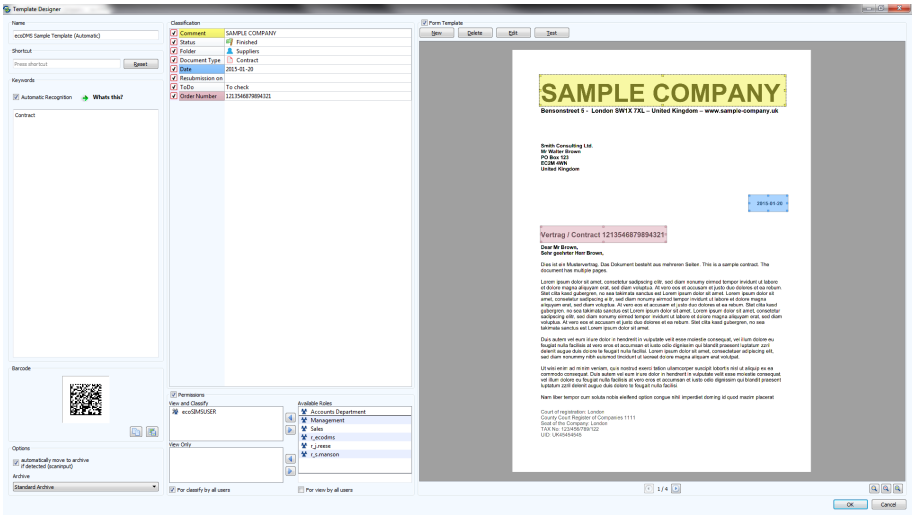

Abbildung 9.6: Template Designer - Automatic Archiving

9.5 Use Template

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **This feature requires a licence of the ecoDMS full version but can be tested during the full-demo time and is then automatically disabled until a full licence is activated.**

- **Only 1 template can be saved in the Community Edition (Free4Three).**
- **If you use keywords, all keyword deposited in ecoDMS must exactly match the words in the document. Use unambiguous terms, e.g. the VAT-ID or the customer number of a company.**
- **Automatic template recognition in ecoICE is only possible for readable TIFF or PDF files scanned in via the scaninput folder.**
- **2D barcodes are read in via the formula recognition function. Classification templates stored as barcodes only apply for files that are scanned via the scaninput folder.**
- **Classification templates can be saved on the server for all users.**
- **When scanning via the TWAIN/WIA/SANE interface, and also when manually separating documents in ecoICE, automatic pre-classification is not possible. Templates can also be searched for and selected manually.**
- **Templates are automatically applied for: PDF and TIFF files during standard and drag and drop archiving in ecoDMS (Windows, Ubuntu, Debian, MacOS), PDF and TIFF files for documents scanned in via scaninput (Windows, Ubuntu, Debian, MacOS), files archived via PDF/A printers (Windows, Ubuntu, Debian), files archived via the Libre/ OpenOffice plug-in (Windows, Ubuntu, Debian, MacOS), files archived via the MS Office plug-in, incl. Outlook (Windows), files archived via the Thunderbird add-on (Windows, Ubuntu, Debian)**
- **The template and/or folder recognition for the plug-ins / add-ons is enabled individually for each user in the Classification dialogue box.**
- **The template and/or folder recognition for the scanning process via the scaninput folder is enabled by the administrator through the Settings dialogue box in ecoDMS.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**

Template recognition is either automatic (depending on the settings and the document) or manual. There are following Options for manual template retrieval:

1. Open the “Classification Dialogue Box” for the document you need. You have following options:
   a) Click the icon “Search for matching Template” in the toolbar.
      i. The system matches the file with the saved "classification templates" and displays the matching results in the classification.
   b) Enter the keyboard shortcut (if available) for the classification template you need
   c) Right-click the mouse in the "Permissions" area and then click "Templates" to select the template
   d) Click the "Templates" button, select the template from the dialogue box that opens, and click "Apply".

The classification saved for the template is applied.

Figure 9.7: Icon - Search for matching Templates

9.6 Delete Template

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**

- **This feature requires a licence of the ecoDMS full version but can be tested during the full-demo time and is then automatically disabled until a full licence is activated.**
- **Only 1 template can be saved in the Community Edition (Free4Three).**
- **Classification templates can be saved on the server for all users.**

To delete a template, complete the following steps:

1. Click the “Classification Dialogue Box” to any document.
2. Click “Templates”.
3. Select the template you want to delete.
4. Click “Delete”.
5. Save process with “OK” or click “Cancel” to cancel.

9.7 Blind Text: Copy Classification to Clipboard

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **The template and/or folder recognition for the plug-ins / add-ons is enabled individually for each user in the Classification dialogue box.**
- **The template and/or folder recognition for the scanning process via the scaninput folder is enabled by the administrator through the Settings dialogue box in ecoDMS.**
- **Reading copied templates only works when archiving with the ecoDMS PDF/A printer under Windows.**
- **BWhen pasting the template from the clipboard, ensure that the individual lines are not be damaged by line breaks.**
- **To hide the code text during archiving, we recommend you select a white font, for example, on a white background.**
- **It is not possible to print from remote sessions with Windows Server 2013. This only works on your local workstation.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**

The classification attributes (not the permissions) of a classification template can be copied to the clipboard and pasted to any position. In this way you can save, for example, dummy text in documents that is recognised during archiving via the "ecoDMS PDF/A printer" under "Windows". The documents are automatically classified when the commands are recognised.

In the manual for ecoDMS add-ons and Plug-ins you can find more details about "Dummy Text recognition & Dark Archiving Process". Here you can also read how you can assign the folder automatically via keys (for example customer number) in the dummy text.

1. Enter the attributes and permissions in the "Classification" dialogue box according to how they should be assigned during automatic recognition
2. Right-click the “Permissions” area
3. Click "Copy Classification to Clipboard"
4. Add any document to the clipboard

a) If you add the <ecoDMSForceArchive/> command to the entry, the document is classified in a dark process when using the PDF/A printer. This command only works with the ecoDMS PDF/A printer.

b) In this case, the classification dialogue box does not open. The document is classified and deposited in ecoDMS.

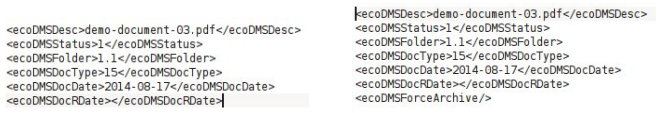

Figure 9.8: Blind Text - Samples

9.8 Create and Use Barcodes

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **This feature requires a licence of the ecoDMS full version but can be tested during the full-demo time and is then automatically disabled until a full licence is activated.**
- **Only 1 template can be saved in the Community Edition (Free4Three).**
- **If you use keywords, all keyword deposited in ecoDMS must exactly match the words in the document. Use unambiguous terms, e.g. the VAT-ID or the customer number of a company.**
- **Automatic template recognition in ecoICE is only possible for readable TIFF or PDF files scanned in via the scaninput folder.**
- **2D barcodes are read in via the formula recognition function. Classification templates stored as barcodes only apply for files that are scanned via the scaninput folder.**
- **Classification templates can be saved on the server for all users.**
- **When scanning via the TWAIN/WIA/SANE interface, and also when manually separating documents in ecoICE, automatic pre-classification is not possible. Templates can also be searched for and selected manually.**
- **Templates are automatically applied for: PDF and TIFF files during standard and drag and drop archiving in ecoDMS (Windows, Ubuntu, Debian, MacOS), PDF and TIFF files for documents scanned in via scaninput (Windows, Ubuntu, Debian, MacOS), files archived via PDF/A printers (Windows, Ubuntu, Debian), files archived via the Libre/ OpenOffice plug-in (Windows, Ubuntu, Debian, MacOS), files archived via the MS Office plug-in, incl. Outlook (Windows), files archived via the Thunderbird add-on (Windows, Ubuntu, Debian)**
- **The template and/or folder recognition for the plug-ins / add-ons is enabled individually for each user in the Classification dialogue box.**
- **The template and/or folder recognition for the scanning process via the scaninput folder is enabled by the administrator through the Settings dialogue box in ecoDMS.**

ecoDMS can recognise documents from barcodes. The system generates a barcode that contains the information from the associated classification template. Documents with a barcode can be classified with the information from the barcode without requiring content information.

1. Click the "Classification" dialogue box for any document.
2. Execute the "Save Template" function. To do this, you have the following options:
   a) Click the "Save Template" button.

   b) Right-click the mouse in the "Permissions" area and select "Save Classification as Template".

3. The "Template Designer" opens. To create a "simple template" (without additional form recognition), complete the following steps:

4. **Name:** Enter a name for the template. Use the name to retrieve and recognise the template.

5. **Keyboard shortcut:** As an option, you can store a shortcut. You can use this shortcut later to open the "classification template" manually in the "Classification" dialogue box.
   a) Use the "Reset" button to remove the "shortcut".

6. **Automatic recognition:** You can only enable this field in combination with a "formula template". If the "Automatic Recognition" command is enabled, the system reads the document header and footer in the background and saves them as an important attribute for the recognition of the "classification template".
   a) If no further criteria (keywords) are stored, the document header and footer must match the template to allow automatic pre-classification.
   b) If you want to enter additional "keywords", the "keywords" and the document header and footer must match the template to enable automatic pre-classification.

7. **Keywords:** Enter the keywords to trigger the automatic "classification template". The "template" is only recognised and executed if the document you are searching for contains exactly these keywords. If everything matches and recognition is successful, the classification information is loaded.
   a) **Please follow the above notes.**

8. **Barcode:** When creating a classification template, ecoDMS automatically generates a 2D barcode. This contains the "classification information" (attributes and their entered values) and "permissions" (if assigned). You can apply these barcodes to documents independent of "keywords" or other criteria in the template. As a rule you use barcodes for "returning documents", i.e. documents created in-house, which are then signed and returned. The classification information and any permissions stored in the 2D barcodes are only read and applied for classification for files that were scanned in via the scaninput folder. To use the 2D barcode you generated, you have the following options:
   a) Copy the barcode to the clipboard
   b) Save Barcode As... (*.JPG)

9. **Classification:** Fill in the "Classification" dialogue box in the "Template Designer". Assign values that are saved as "classification template" and which you want to be used for "classification" when the template is executed.
   a) Now enable the attributes you want to be used when the "classification template" is executed.
      i. Only the enabled attributes are overwritten when the template is executed. All other attributes remain untouched by the template.

10. **Permissons:** As an option you can enable the "Permissions" for the "Classification Template". In this case the "permissions" stored here are also used for "classification".

11. Save the template by clicking "OK" or cancel the operation with "Cancel".

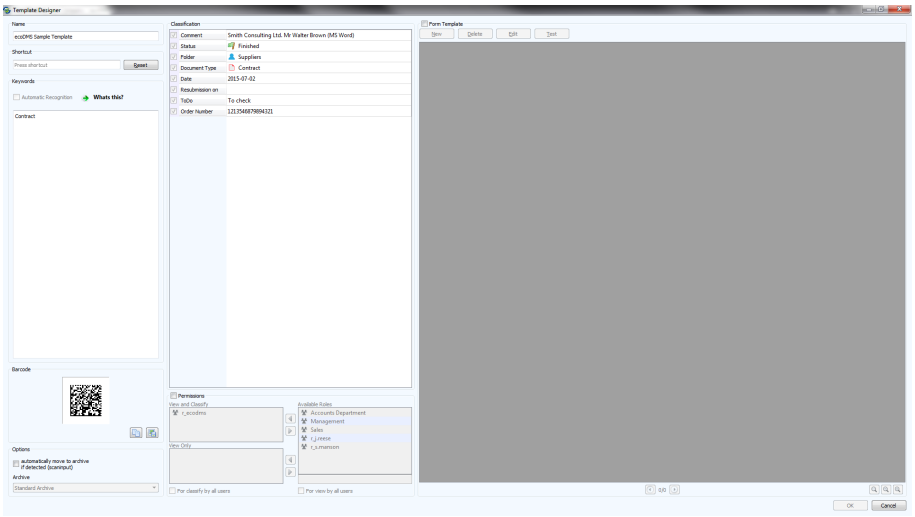

Figure 9.9: Classification Template - Simple Template

9.9 Switch Folder Recognition On / Off

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **This feature requires a licence of the ecoDMS full version but can be tested during the full-demo time and is then automatically disabled until a full licence is activated.**
- **Only 1 template can be saved in the Community Edition (Free4Three).**
- **If you use keywords, all keyword deposited in ecoDMS must exactly match the words in the document. Use unambiguous terms, e.g. the VAT-ID or the customer number of a company.**
- **Automatic template recognition in ecoICE is only possible for readable TIFF or PDF files scanned in via the scaninput folder.**
- **2D barcodes are read in via the formula recognition function. Classification templates stored as barcodes only apply for files that are scanned via the scaninput folder.**
- **Classification templates can be saved on the server for all users.**
- **When scanning via the TWAIN/WIA/SANE interface, and also when manually separating documents in ecoICE, automatic pre-classification is not possible. Templates can also be searched for and selected manually.**
- **Templates are automatically applied for: PDF and TIFF files during standard and drag and drop archiving in ecoDMS (Windows, Ubuntu, Debian, MacOS), PDF and TIFF files for documents scanned in via scaninput (Windows, Ubuntu, Debian, MacOS), files archived via PDF/A printers (Windows, Ubuntu, Debian), files archived via the Libre/ OpenOffice plug-in (Windows, Ubuntu, Debian, MacOS), files archived via the MS Office plug-in, incl. Outlook (Windows), files archived via the Thunderbird add-on (Windows, Ubuntu, Debian)**
- **The template and/or folder recognition for the plug-ins / add-ons is enabled individually for each user in the Classification dialogue box.**
- **The template and/or folder recognition for the scanning process via the scaninput folder is enabled by the administrator through the Settings dialogue box in ecoDMS.**

The keywords deposited in the folder structure can also be used for automatic pre-classification. If a document is scanned and archived via the printer driver or via the Office Plug-in, and no template is recognised, the document can still be assigned to the respective folder using the keywords. Folder recognition can be configured for each workstation.

1. Enter the appropriate keywords for the folders in the "Settings" dialogue box (refer to the "Settings" chapter in the ecoDMS Manual).
2. Click the “Classification Dialogue Box” to any document.
3. Right-click the "Permissions" area in the "Classification" dialogue box.
4. Click the "Options" function.
5. Enable or disable the function with the "Keyword Recognition (Folder)" checkbox.

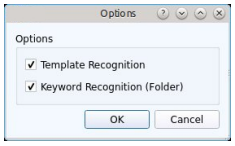

Figure 9.10: Classification - Options - Keyword Recognition (Folder)

9.10 Switch Template Recognition On / Off

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You can only classify and archive documents if you have the permission to do so.**
- **Classification templates can be saved on the server for all users.**
- **Templates are automatically applied for: PDF and TIFF files during standard and drag and drop archiving in ecoDMS (Windows, Ubuntu, Debian, MacOS), PDF and TIFF files for documents scanned in via scaninput (Windows, Ubuntu, Debian, MacOS), files archived via PDF/A printers (Windows, Ubuntu, Debian), files archived via the Libre/ OpenOffice plug-in (Windows, Ubuntu, Debian, MacOS), files archived via the MS Office plug-in, incl. Outlook (Windows), files archived via the Thunderbird add-on (Windows, Ubuntu, Debian)**
- **The template and/or folder recognition for the plug-ins / add-ons is enabled individually for each user in the Classification dialogue box.**
- **The template and/or folder recognition for the scanning process via the scaninput folder is enabled by the administrator through the Settings dialogue box in ecoDMS.**

Template recognition can be configured for the PDF/A printer, e-mail add-ons and Office Plug-ins on each workstation.

1. Click the “Classification Dialogue Box” to any document.
2. Right-click the "Permissions" area in the "Classification" dialogue box.
3. Click the "Options" function.
4. Enable or disable the function with the "Template Recognition" checkbox.

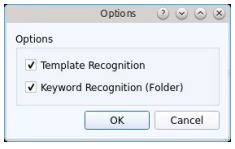

Figure 9.11: Classification - Options - Template Recognition

10 Archiving

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **After the archiving process, the scanned PDF or TIFF files are automatically converted into the (readable) PDF/A format. The quality and size of the file determine the conversion time and the feasibility. After the successful conversion, the PDF/A can be opened. Until then the original file remains. You can open the PDF/A via the table. You can retrieve the original files via the version management function.**
- **We recommend you store all documents in an archive. This simplifies the search and filing processes immensely.**
- **If multiple archives are created, files can be moved to another archive if necessary.**
- **If several classification templates are recognised for a document, they are displayed on tabs in the classification dialogue box. Delete all tabs that do not apply BEFORE archiving. Otherwise the document will be classified and archived several times. The DocID would then occur several times. This would result in multiple DocIDs.**
- **Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display of the attributes therefore depends on the settings.**

Depending on the settings more archives can be set (not recommended - see ecoDMS Manual: "archives".). Before you archive a document definitively the correct archive should be selected.

1. Select the “Archive” from the list in the toolbar.

After you have selected the correct archive, reviewed the document and possibly edited and classification information has been entered correctly, the document can be stored in the archive ecoDMS.

1. Click the button “Archive” in the “Classification Dialogue Box”.
2. This process can not be undone.
3. Later changes to the document are now no longer possible because of audit-proof.
   a) The documents are archived as “Finalised” files. You can add any versions.

11 Delete Documents from the Server

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **You cannot undo this operation.**

Documents that do not have to be archived can be removed from the server.

1. Select the document.
2. Click the toolbar icon “Delete Document from Server”.

Figure 11.1: Icon - Delete Document from Server

12 Storage Functions

There are various functions for saving documents and/or changes. By default this application is provided for archiving of scanned documents in the document management system ecoDMS. In addition to the archiving function, the software also includes other functions to save documents. These can be used in parts independently of the archive function.

12.1 Save Changes

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **In order to classify and archive a document, the changes must first be saved.**
- **Please note that this function does not archive the file. The changes are saved.**

The “Classification Dialogue Box” is enabled if you make changes to a scanned document (for example: Rotate Pages, Delete Pages...). To unlock the document for "classification", the changes must be saved first. Complete the following steps:

1. Make the required modifications to the document.
2. Use the function “Save”. To use the function, there are several options:
   a) Click menu “File - Save” **or**
   b) Click the toolbar icon “Save” **or**
   c) Enter this shortcut: Ctrl + S

12.2 Save as PDF

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **This feature requires a licence of the ecoDMS full version but can be tested during the full-demo time and is then automatically disabled until a full licence is activated.**
- **Please note that the function does not archive the file but only saves it on your local hard disk in the PDF format.**

The scanned documents can be saved as a PDF file locally, on a data carrier or in the file system.

1. Select the document.
2. Use the function “Save as PDF”. To use the function, there are several options:
   a) Click menu “File - Save as PDF” **or**
   b) Click the toolbar icon “Save as PDF”
3. Use the filename and the destination to specify the PDF in the dialogue box that opens.
4. You can also save the file as a searchable PDF.
   a) To do so, enable the command "Save as searchable PDF".
      i. This function is only included in the ecoDMS full version.
5. Click "Save" to save the PDF or "Cancel" to cancel the process.

Figure 12.1: Icon - Save as PDF

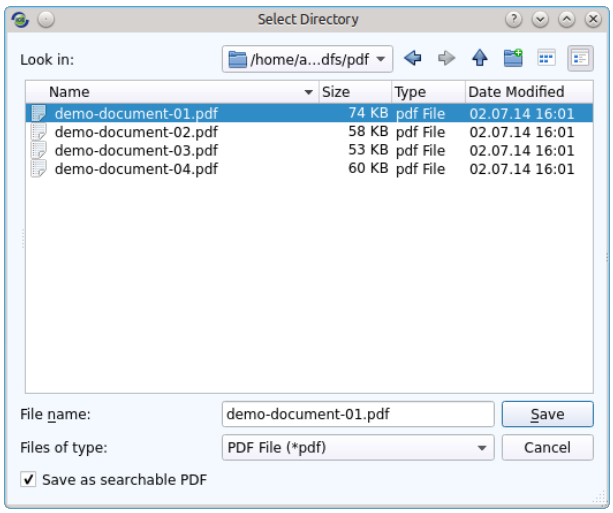

Figure 12.2: Save as searchable PDF

12.3 Save as

- **Function / component available for: Windows, Ubuntu / Debian, MacOS (according to system requirements)**
- **Please note that the function does not archive the file but only saves it on your local hard disk.**

The scanned documents can be saved on a data carrier or in the file system.

1. Select the document.
2. Use the function “Save as”. To use the function, there are several options:
   a) Click menu “File - Save as” **or**
   b) Click the toolbar icon “Save as”
3. Use the filename and the destination to specify the file in the dialogue box that opens.
4. Click "Save" to save the file or "Cancel" to cancel the process.

Figure 12.3: Icon - Save as PDF

13 Access Data

Below you can read the existing login data.

13.1 Default User

The following user is the specified default user in ecoDMS.

- User name: ecodms
- Password: ecodms

We recommend you change the password as soon as possible.

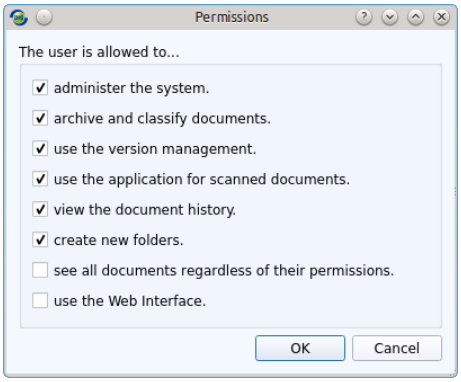

Figure 13.1: Permission Default User

13.2 System Administrator

Apart from the automatically generated user there is also a so-called system administrator. This user works on the system configuration and has the right to make system settings and create new users. This user is not able to archive, view and/or classify documents.

- User name: ecoSIMSAdmin
- Password: ecoSIMSAdmin

For security reasons, this password should be changed immediately after login.

13.3 PostgreSQL Datenbase

If postgreSQL is installed over the ecoDMS installer, the following user information is used for the database:

- User name: postgres
- Password: postgres

If there is already a matching postgreSQL version available because, for example, the database was installed manually, the access data that was assigned during the installation of postgreSQL applies.

13.4 Scaninput Folder

The “Scaninput Folder” is a Samba share. A standard user is created during the Ubuntu installation.

- User name: dmsscanner
- Password: dmsscanner

You can also enter any other user created in the Ubuntu system.

14 Troubleshooting & Support

- **We offer a remote maintenance service in which we deal with any problems immediately. We collect the information necessary to solve the issue directly and - or carry out any service, support and training services the customer wishes. We recommend you close any applications that might contain personal or confidential information before you request and accept a remote maintenance session and make a complete backup. In order to save time and money, we also recommend you to start the support tool (pcvisit) bevor you call us. More details under www.ecodms.de**

We will be happy to support you when you use ecoDMS: To do so, we offer various service and support options:

- In our knowledge database you can find helpful articles on different technical topics:
  http://ecodms.de/index.php/en/support/faq
- The user manuals provide a detailed description of the individual installation steps, settings and functions:
  http://ecodms.de/index.php/en/download/productinformation-manuals
- In addition, our free training videos provide the perfect start to ecoDMS:
  http://ecodms.de/index.php/de/product1/videos
- You can also select various support packages which give you direct support from the manufacturer based on the "Prepaid Principle". Whether you need technical advice or have questions regarding contents, general support, or installation service, or user training, our flexible service packages offer a professional all-round carefree service during our office hours including a free support hotline and/or email support. You can find an overview of the support packages at:
  http://ecodms.de/index.php/en/support/support-packages
- If you do not have a support package, our Support Hotline is available for a fee. You can find the number at:
  http://ecodms.de/index.php/en/support/support-hotlines
- You can find further information on our services and support at:
  http://ecodms.de/index.php/en/service

15 System Requirements

You can read more about the system requirements for this ecoDMS version on our website. Click the following link for the necessary technical details:
http://ecodms.de/index.php/en/support/system-requirements